

CHRISTOPER T. SMITH – FAC/DAWII CERTIFICATIONS AND COURSES						
Date	FAC-C/DAWII CERTIFICATION	WARRANT	OTHER	COURSE	AGENCY	CLPs/CEUs/ HOURS
05/16/2011			Army Acquisition Corps Membership			
04/15/2011				Contracting Officer Representative (DAU COR 222 Equivalent)	United States Army Logistics University	
01/10/2006				Software Licensing Under Federal Contracts	NCMA	4 hours
12/10/2003		\$8,000,000 for Open Market Acquisitions MOL for FSS			United States Peace Corps	
4/14-18/2003				Multinational Program Management Course –PMT 202 (03-003)	Defense Acquisition University	3
03/12/2003		\$100,000 for Open Market Acquisitions and MOL for FSS			United States Peace Corps	
06/01/2001				Simplified Acquisition Procedures (DAU CON 237)	Defense Acquisition University	1.6
01/31/2001		Level III (Unlimited)			United States Environmental Protection Agency	
02/9-11/2000				Business Law and the Uniform Commercial Code	George Washington University	1.8 Certificate 24
				Intg Comm'l Prac w/Govt Bus Prac	NCMA/NAPM	24

CHRISTOPHER T. SMITH – FAC/DAWII CERTIFICATIONS AND COURSES –cont.						
Date	FAC-C/DAWII CERTIFICATION	WARRANT	OTHER	COURSE	AGENCY	CLPs/CEUs/ HOURS
12/05/2000			Procurement Professional Certification (Level II)		United States Environmental Protection Agency	
09/24/1999				Joint Course On Logistics (ALMC-JC)	United States Army Logistics Management College	
04/22/1996	DAWII Level III				Defense Logistics Agency	
08/11/1995				Executive Pre-Award Contracting Course (CON 311)	Department of Defense	36
05/13/1994				Intermediate Contract Administration (CON 221)	Department of Defense	80
11/05/1993				Executive Contracting (CON 301)	Department of Defense	40
01/16/1992				Successful Completion of All Requirements for the Training Program in Procurement	Defense Logistics Agency	
08/22/1991				Management of Defense Acquisition Contracts (ADV) 8D-F12 (ACE) Resident	Department of Defense	150 hours
08/24/1990				Defense Contract Law	Department of Defense	80
04/27/1990				Defense Small Purchase (Basic)	Department of Defense	80
03/23/1990				Defense Contract Negotiation Workshop	Department of Defense	40
03/16/1990				Defense Cost and Price Analysis	Department of Defense	80

LIST OF PARTICIPANTS MULTINATIONAL PROGRAM MANAGEMENT COURSE - PMT 202 (03-003)

April 14 - 18, 2003
Ft. Belvoir, VA

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April 11, 2003

MEMORANDUM FOR PROSPECTIVE ATTENDEES TO THE FIFTEENTH
INTERNATIONAL DEFENSE EDUCATIONAL
ARRANGEMENT (IDEA) SEMINAR

SUBJECT: Invitation to the Fifteenth IDEA Seminar

The Defense Acquisition University (DAU), along with equivalent defense education institutions in the United Kingdom, Germany, France and Spain, will conduct the Fifteenth International Defense Educational Arrangement (IDEA) seminar at DAU, Fort Belvoir, Virginia, from June 23-27, 2003.

On behalf of IDEA, we invite you or someone from your organization to attend the seminar as a participant. The seminar will include industry and government presentations and case-based learning, to allow a robust, positive exchange of information and feedback. The theme of the seminar will be "Interoperability in the International Environment." Each participant will be responsible for his or her own travel and hotel arrangements and expenses. There will be a registration fee of \$125.00 (cash or U.S. check only) for attending the seminar. This will be collected on the first day of registration. While the seminar is unclassified, international participants must obtain a visit clearance through their embassy.

To register for the seminar please go to our website, no later than May 31, 2003, at http://www.dau.mil/international/international_15.htm. If you have questions you can contact Ms. Sharon Boyd at sharon.boyd@dau.mil or dau_intlseminars@msn.com, by phone 703-805-5196 or fax 703-805-3175.

If you are interested in what else is available at DAU, you will see that we have an international continuous learning module titled, "International Armaments Cooperation Course (IAC)." You can enroll for this learning experience by going to http://clic.dau.mil/kc/no_login/portal.asp. You can also go to our DAU webpage at <http://www.dau.mil> and check out our "e-Learning" site that will guide you on how to enroll for the many distance learning courses and continuous learning modules that are available. We look forward to seeing you in June at the seminar!

(b) (6)

D. P. FITCH
Dean, DSMC-School
of Program Managers



UNITED STATES ENVIRONMENTAL PROTECTION AGENCY
WASHINGTON, D.C. 20460



OFFICE OF
ADMINISTRATION
AND RESOURCES
MANAGEMENT

DEC 5 1999

MEMORANDUM

SUBJECT: Procurement Professional Certifications
FROM: Gina E. Nighengale, Acting Director
[REDACTED] (b) (6)
Policy, Training, and Oversight Division (3802R)
TO: Ronald L. Kovach, Acting Director
Headquarters Procurement Operations Division (3804R)

Your memorandum of November 29, 2000, documents that the following employees of the Administrative Contract Service Center met the Department of the Defense requirements for Level 2 or higher certification in contracting:

Michelle A. Bailey
Jerome Lofton
Frances T. Manley
Christopher T. Smith

In accordance with Unit 15 of the Acquisition Handbook, having earned the Department of Defense contracting certification automatically qualifies these employees for the Agency's Procurement Professional Certificate. Please present the attached certificate to them and extend my congratulations on their achievement.

Attachment

FAC-C Level I

COURSE	TITLE	CLPS	VENDOR
CON 100	Shaping Smart Business Arrangement	16	Online
CON 121	Contract Planning	12	Online
CON 124	Contract Execution	13	Online
CON 127	Contract Management	10	Online
CON 170	Fundamentals of Mission-Focused Contracting	80	Classroom
CLC 031	Reverse Auctioning	2	Online
CLC 057	Performance Based Payments and Value of Cash Flow	4	Online
CLC 058	Intro to Contract Pricing	2	Online
CON 090/ FCN190	FAR Fundamentals	80 (FED) 160 (DAU)	Classroom

FAC-C Level II

COURSE	TITLE	CLPS	VENDOR
CON 200	Business Decisions for Contracting	25	Online
CON 216	Legal Considerations in Contracting	23	Online
CLC 056	Analyzing Contracts Costs	17	Online
CON 270	Intermediate Cost and Price Analysis	80	Classroom
CLC 051	Industrial Property in the Possession of Contractors	2	Online
HBS 428	Negotiating	2	Online
CON 280	Source Selection and Administration of Service Contracts	80	Classroom
CON 290	Contract Administration & Negotiation Techniques in a Supply Environment	80	Classroom

Plus all Level 1 training

FAC-C Level III

COURSE	TITLE	CLPS	VENDOR
CON 360	Advanced Business Solutions for Mission Support	80	Classroom
HBS module	Any HBS course other than HBS 428		Online
	Choose 1 of the following:		
ACQ 265	Mission-Focused Services Acquisition	40	Classroom
ACQ 315	Understanding Industry	40	Classroom
ACQ 370	Contract Law	40	Classroom
CON 244	Construction Contracting	40	Classroom
CON 252	Fundamentals of Cost Accounting Standards	40	Classroom
CON 370	Advanced Contract Pricing	80	Classroom
32 hours of electives*	<i>*The 32 hours of electives may be one course or a series of courses. Each course should be at least eight hours in length and can be classroom, online, or a</i>		

	<i>combination of the two. Topics must be related to acquisition and may include general business courses such as statistics or budgeting. Topics of subject areas may also be in a technical area related to the individual's specific work, such as IT. Agencies have the option of specifying the courses their workforce members must take to meet the 32 hours of electives.</i>		
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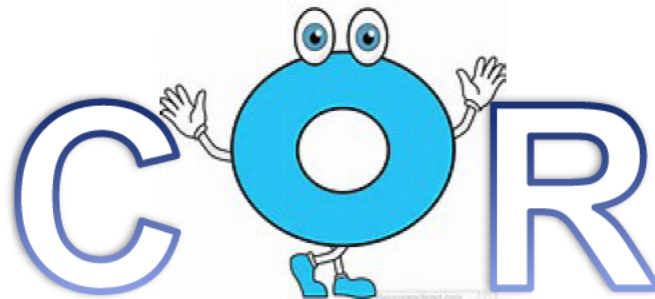
Plus all Level I and Level II training

Warrant

COURSE	TITLE	CLPS	VENDOR
CON 237	Simplified Acquisition Procedures	40	Classroom
FAC 043	Ethics & Procurement Integrity for the Workforce	2	Online
	*Performance Based Acquisition	24	Classroom

*Not required for Basic Warrant (Up to 25K)

COURSE	TITLE	CLPS	VENDOR	
CON 100	Shaping Smart Business Arrangement	16	Online	Week of April 20
CON 121	Contract Planning	12	Online	
CON 124	Contract Execution	13	Online	Week of May 18
CON 127	Contract Management	10	Online	
CON 170	Fundamentals of Mission-Focused Contracting	80	Classroom	June 01-12, 2015: MCI- Washington, DC Aug. 03 -14, 2015
CLC 031	Reverse Auctioning	2	Online	Anytime during the month of July
CLC 057	Performance Based Payments and Value of Cash Flow	4	Online	Anytime during the month of July
CLC 058	Intro to Contract Pricing	2	Online	Anytime during the month of July
CON 090/ FCN190	FAR Fundamentals	80 (FED) 160 (DAU)	Classroom	May 11-22, 2015 July 2 – Aug 7, 2015 Sept 14 -25, 2015: MCI – Washington, DC



TRAINING SESSION

Presented by



AGENDA

- **Acquisition Cycle**
- **What does it take to be a COR?**
- **How do I request certification?**
- **Roles and Responsibilities**
- **Documenting the COR File**
- **Tips for Success**

Break – 10 minutes

- **Unauthorized Commitments**
- **Procurement Integrity**
- **Effective Interactions with Contractors**
- **Q&As**

Acquisition Planning

Determination
of Need

Market
Research
(I)

Acquisition
Planning
(I)

Independent
Government
Cost Estimate
(P)

Funding
(P)

Analysis of
Requirement

Statement of
Work
(P)

Statement of
Objectives
(P)

Extent of
Competition

Sources
(I)

Small
Business
(I)

Source
Selection
Planning

Evaluation
Criteria
(P)

Method of
Procurement
(I)

Solicitation
Terms and
Conditions

Contract Type
(I)

Procurement
Planning
(A)

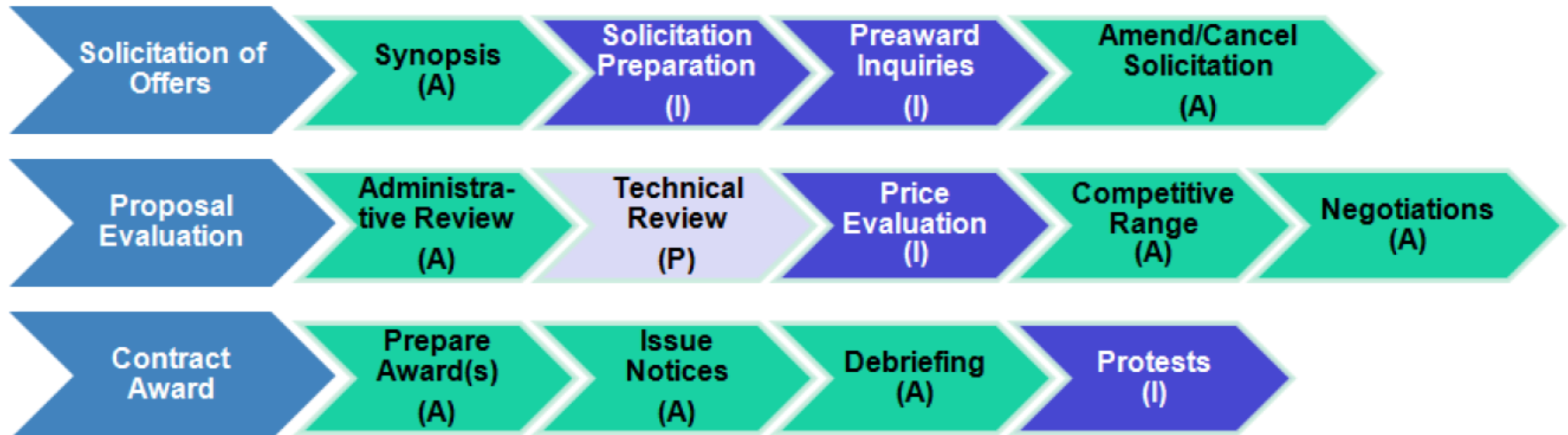
Legend:

I = Integrated Project Team

P = Project Management Office

A = Acquisition

Contract Formation



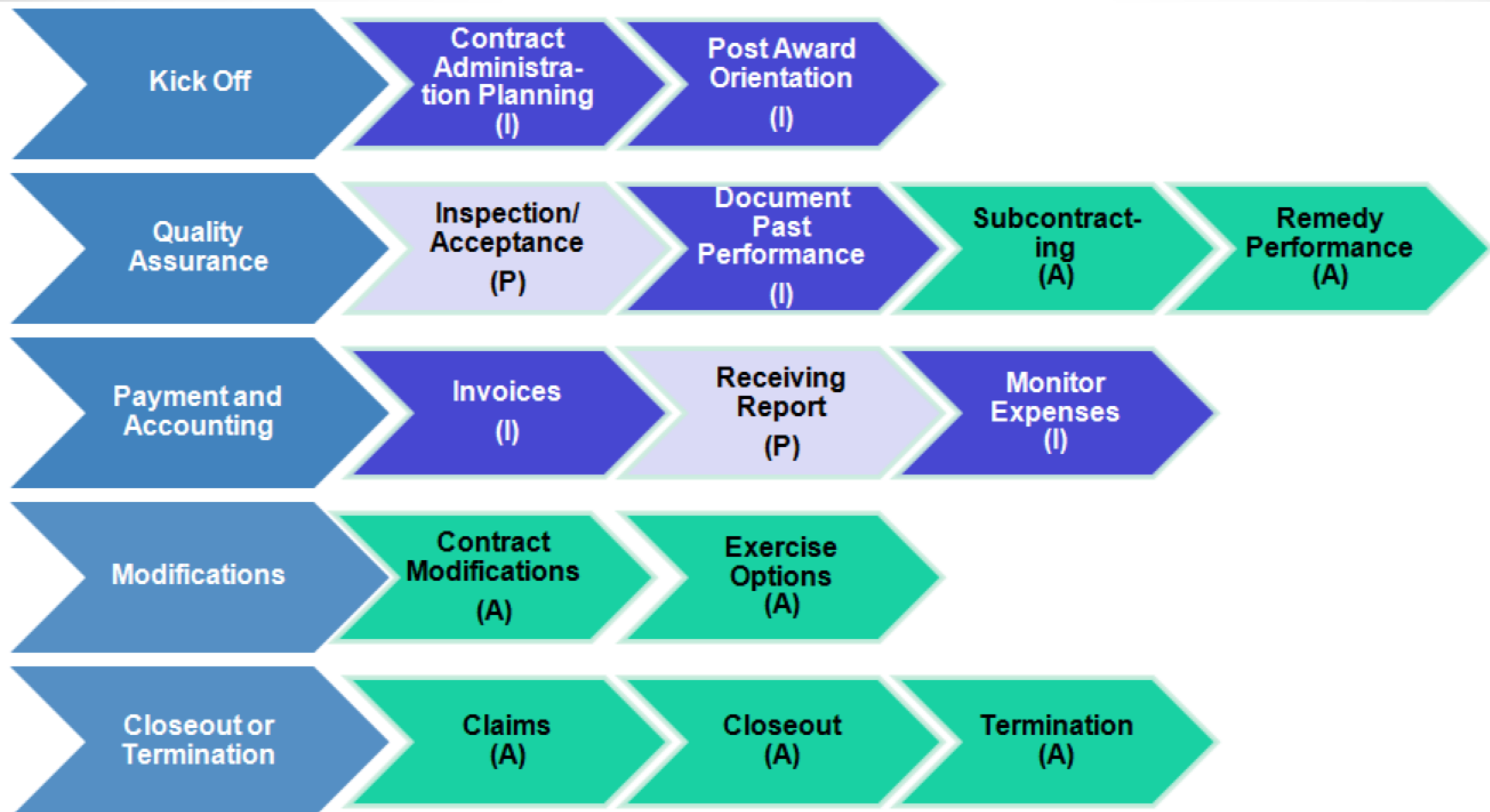
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Contract Administration



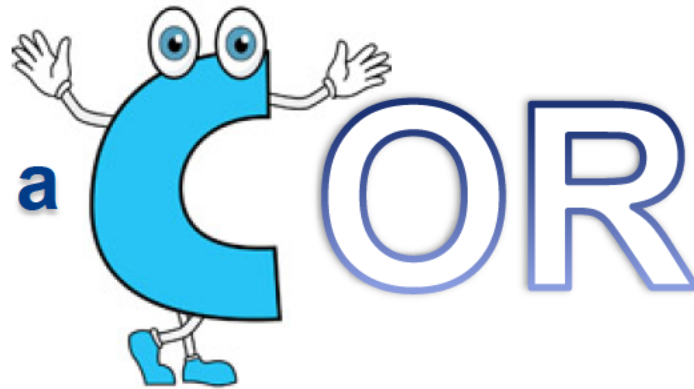
Legend:

I = Integrated Project Team

P = Project Management Office

A = Acquisition

What is a



Contracting Officer's Representative (COR)

Defined by FAR 2.101 and GSAM 501.604

Contracting Officer's Representative (COR) - An individual designated and authorized in writing by the Contracting Officer to perform specific technical or administrative functions. COR's develop proper requirements and ensure during contract administration that contractors meet the commitments of their contracts, including the timeliness and delivery of quality goods and services as required by the contract.

Any GSA employee assigned to perform COR duties, regardless of series, must obtain FAC-COR certification. Certification must be achieved no later than six (6) months from the date of their appointment. (GSAM 501.604(a))

Certified FAC-CORs are members of the Acquisition Workforce (AWF).

What does it take to become a COR?



Know the three FAC-COR Levels



Know what FAC-COR Level should be assigned to what types of contracts.



Experience required to be a COR



Training required to be a COR



Continuous learning required to be a COR



Written appointment by a Contracting Officer

FAC-COR Certification Levels

	FAC-COR Level I	FAC-COR Level II	FAC-COR Level III
Type of Contracts	Basic, low risk such as supply contracts and orders	Firm Fixed Price (FFP), Labor-Hour (L-H) or Time & Materials (T&M) contracts with moderate risk	Other than FFP contracts (e.g., cost-type contracts, letter contracts, contracts with incentives, contract financing, hybrids, etc.) or similar high risk contracts
Experience	None	1 year as COR	2 years as COR
Training	8 hours	40 hours	60 hours
Continuous Learning (CLPs)	8 hours every 24 months	40 hours every 24 months	40 hours every 24 months

How do I request certification? FAITAS (www.fai.gov)

- **FAITAS registration required** (www.fai.gov)
(See FAITAS User Guides for step-by-step instructions)
- **Certification Request:**
 - Upload current resume _____
 - Select or upload training certificates _____
 - Upload your current year ethics training certificate _____
- **Maintaining Certification (every 24 months):**
 - Complete required number of Continuous Learning Points (CLPs) for your FAC-COR certification level
 - Select or upload training certificates _____
 - Submit an Achievement Request _____

Test Your Knowledge...

**How many CLPs are required to maintain
FAC-COR certification at...**

Level I

Level II

Level III



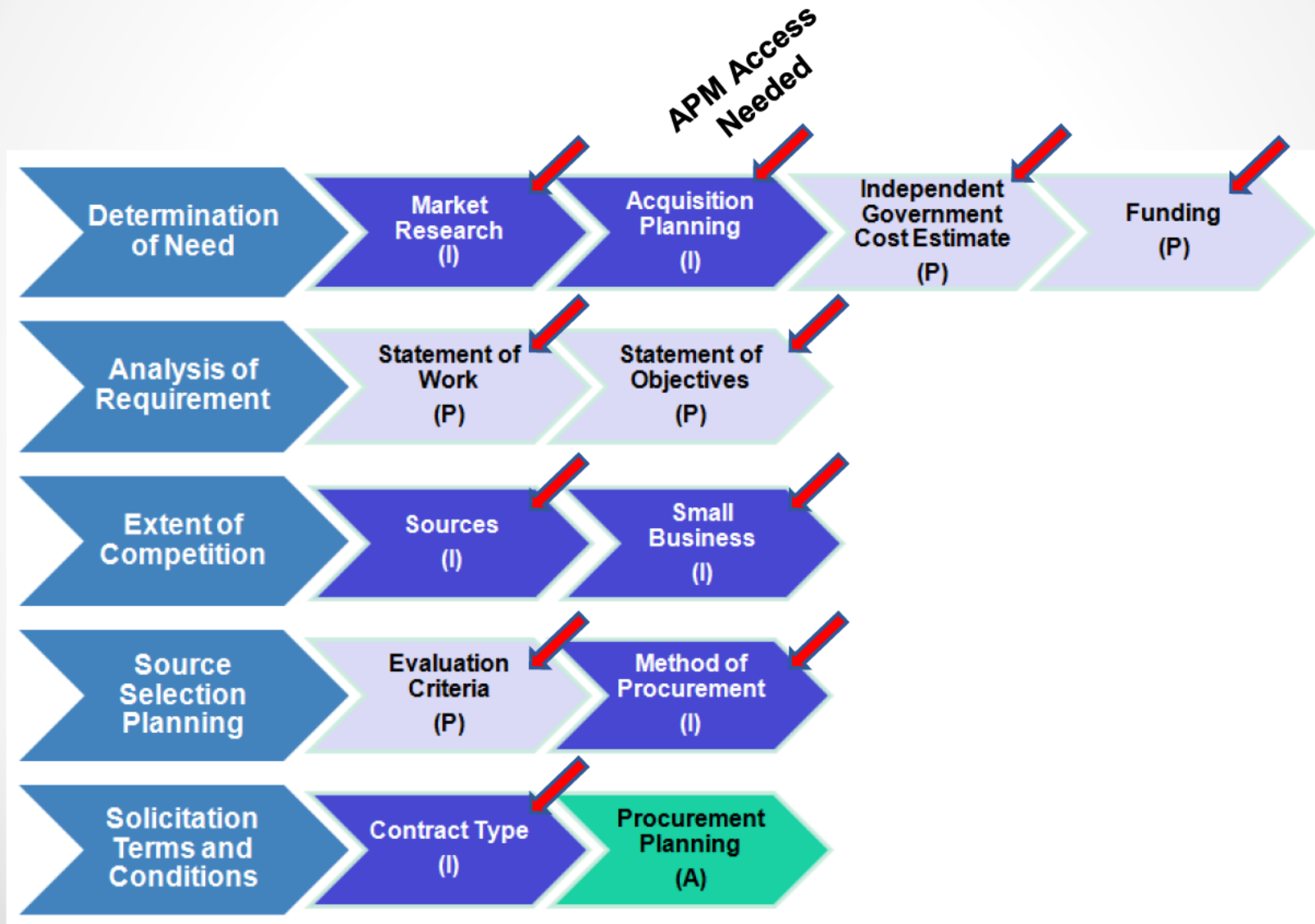
Roles and Responsibilities

r o l e s

&

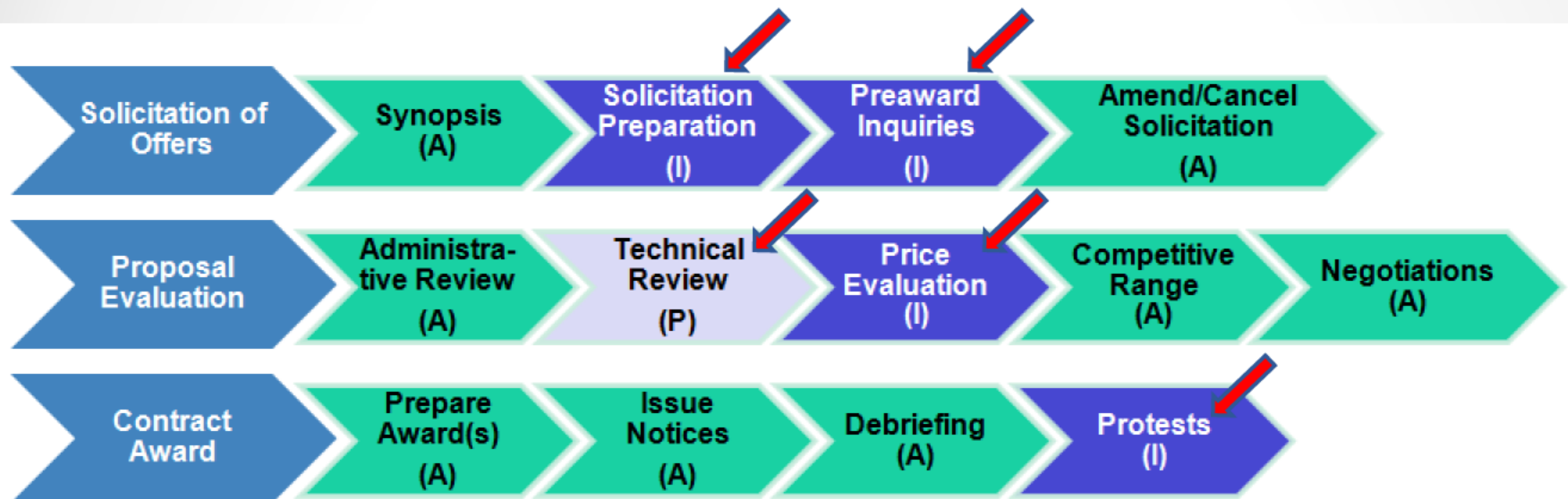
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COR Participation in Acquisition Planning

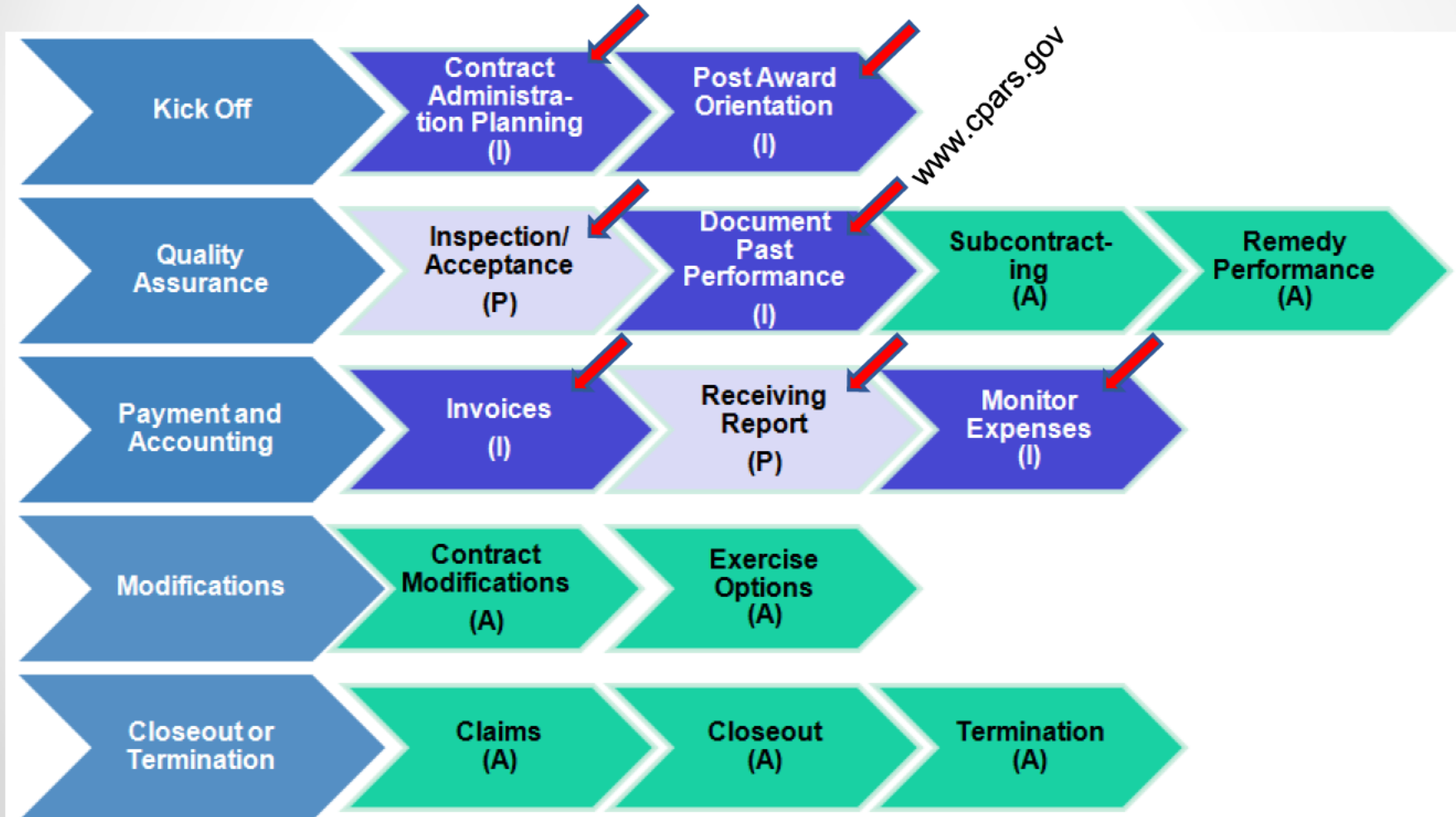


COR Participation in Contract Formation

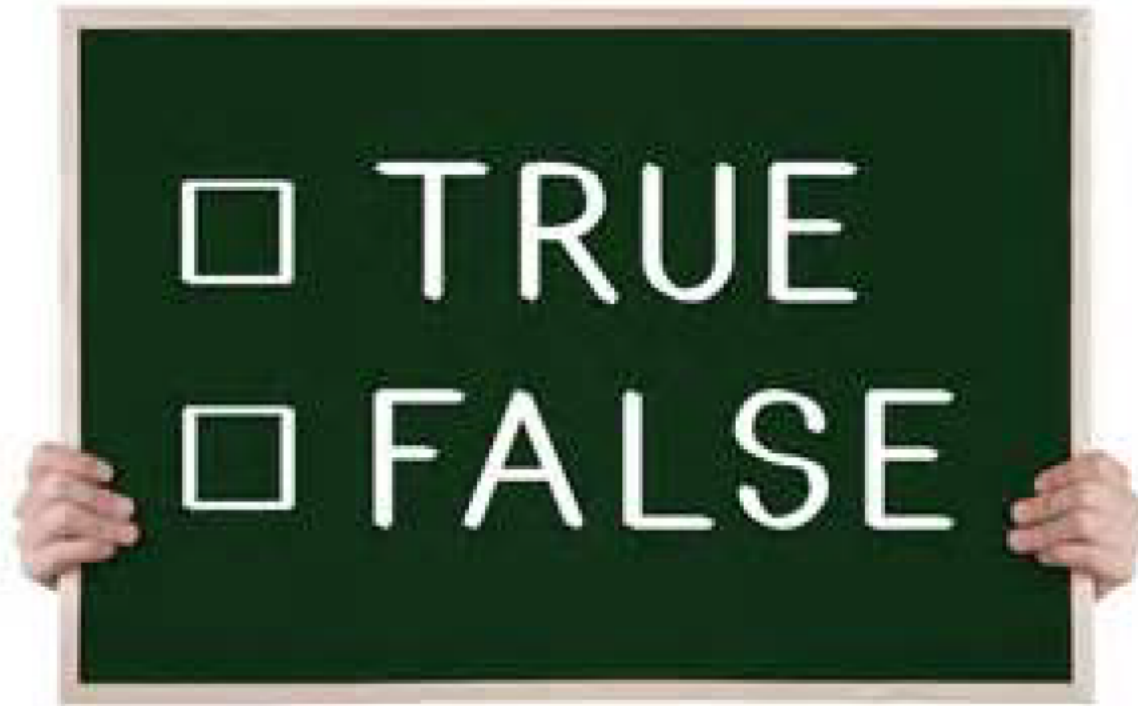
www.fbo.gov
www.ebuy.gsa.gov



COR Participation in Contract Administration



Test Your Knowledge...



The COR role takes place only during the Contract Administration phase of the Acquisition Cycle.

What is my role as a COR?

To be the “eyes” and “ears” of the CO.



Relationship between the CO and the COR

- Partners in acquisition
- Day-to-day technical POC
- Communicate,
Communicate,
Communicate
- Keep current on applicable acquisition policy



Test Your Knowledge...

What is the COR's role?



COR Documentation

COR's should keep separate files for each contract to which they are assigned. Files should include --

- Copy of COR delegation letter;
- Copy of all correspondence, emails, and contact records between COR and the contractor;
- Copy of COR inspection records;
- Copy of all invoices;
- Copy of contract performance evaluation;
- Any other documents pertinent to the contract.

COR folders should be kept electronically for ease in merging the COR file with the official contract file at the time of contract closeout.

COR File Checklist



- FAR 4.801(b) Documentation shall be...a complete history of the transaction for the purpose of:
 - Provide complete background as a basis for informed decisions
 - Supporting actions taken
 - Provide info for reviews and investigations
 - Litigation/congressional/inquiries
- FAR 4.802(b) requires files to be kept separate
- Files are source selection sensitive--protect them!

COR File Checklist

- [INSERT A SAMPLE OR REQUIRED COR CHECKLIST HERE TO ILLUSTRATE]

Break Time



COR Keys to Success

1. Understand your role

- Know your contract inside and out.
- Assist the CO in those areas of the acquisition cycle where COR input is needed.

2. Understand the limits of your authority

- Understand procurement integrity and the limits of what you can share with others (e.g., Source Selection Sensitive Information, etc.).
- Don't exceed your authority.

3. Communication and Documentation

- When in doubt, ask the Contracting Officer.
- Review contract deliverable due dates and period of performance and organize them on a project plan and/or calendar.
- Monitor contractor performance and keep notes on dates, performance issues, impacts to contract deliverables, and annotate if / when resolution occurs.

CORs are Not Authorized To...

- Make changes in the task, scope, price, quality, quantity, or delivery schedule.
- Make enhancements to the contract.
- Make commitments or promises to any contractor.
- Start or stop work.
- Direct changes (oral or written).
- Authorize delivery or disposition of government-furnished property.
- Obligate the government.
- Deviate or waive contract terms and conditions.
- Change the period of performance.
- Approve the use of subcontractors or consultants.
- Authorize the use of overtime.
- Enter into a contract on behalf of the government.
- Meddle in contractor operations.



Unauthorized Commitments



Ratification of Unauthorized Commitments is covered by GSAM 501.602-3.

Unauthorized commitments may violate laws or regulations and constitute serious employee misconduct. Disciplinary action may be warranted.

Government employees can be held financially liable for unauthorized commitments.

When in doubt, ask your Contracting Officer!

Test Your Knowledge...

**What are the three keys to
a COR's success?**



Test Your Knowledge...

Yes or No: Can a COR...?

1. Develop a cost-effective administration plan?
2. Make promises (oral or written) to any contractor?
3. Direct “Changes” (oral or written) to any contractor?
4. Grant deviations from, or waive any terms and conditions of, the contract?
5. Inform the contractor of failures to comply with the technical requirements of the contract?
6. Perform final inspection/acceptance of all deliverables required under the contract?
7. Change the period of performance?



Procurement Integrity

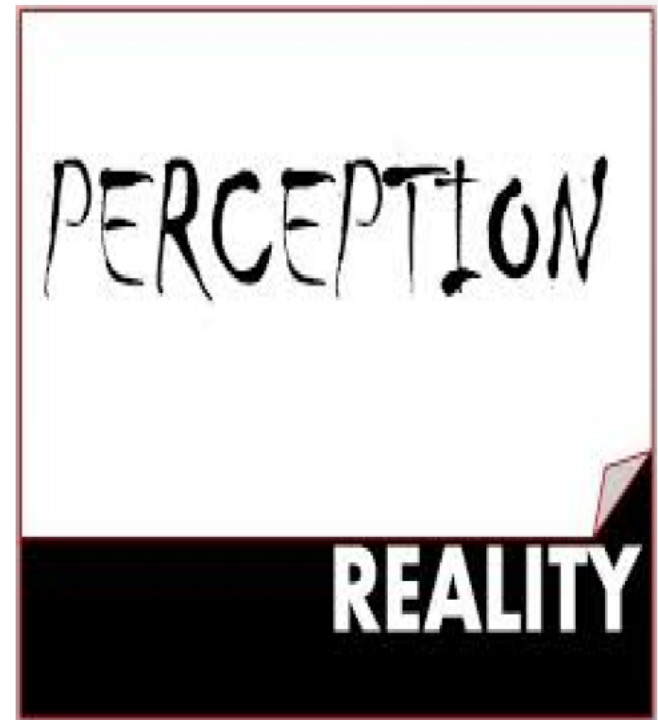


The Procurement Integrity Act (FAR 3.104) imposes stringent requirements relating to the contractor's proprietary data and other integrity issues.

General Principles

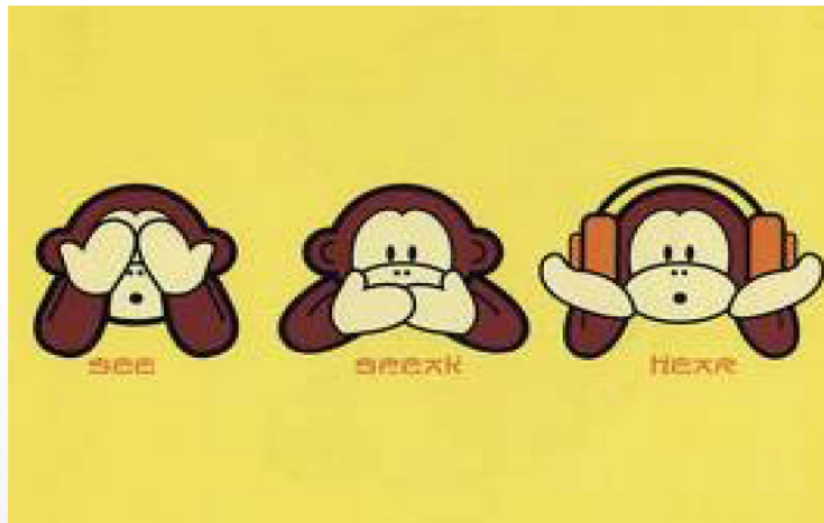
Avoid, strictly, any conflict of interest or even the appearance of a conflict of interest in Government-contractor relationships. (See FAR 3.101)

Persons authorized to access proposals and source selection information to accomplish their responsibilities in a procurement must safeguard that information and avoid unlawful disclosure. (See GSAR 503.1)



Select Laws, Regulations, & Policies

- Procurement Integrity Act, 41 U.S.C. § 423
- Trade Secrets Act, 18 U.S.C. § 1905
- Acts affecting a personal financial interest, 18 U.S.C. § 208
- Standards of Ethical Conduct 5 C.F.R. § 2635
- Federal Acquisition Regulation Subpart 3.1
- General Services Acquisition Regulation Subpart 503.1



Procurement Integrity Act



Violation of the Act carries criminal and civil penalties.

- Criminal penalties may include imprisonment for up to 5 years or a fine or both
- Civil penalties may include a fine of up to \$50,000 per violation + twice the amount of compensation offered or received

Conflict of Interest Acknowledgment and Nondisclosure Agreement

- Abide by the terms of your *Conflict of Interest Acknowledgment and Nondisclosure Agreement* in order to avoid violations of these laws and regulations.
- Should questions arise as to the handling of procurement information received in the performance of your duties, please contact the Contracting Officer.
- See your Contracting Officer or the agency Ethics Advisor on questions related to Conflict of Interest.



Appropriate and Effective Interactions with Contractors

Public service is
a public trust.



Perception Is Reality



IMPACT TO MISSION:

Misused funds

Wasted resources on ratifications

Disciplinary action

The APPEARANCE of inappropriate behavior is the same as the behavior itself.

Perception can be reality.

CATBERT: EVIL HR DIRECTOR

CONTRACTORS ARE NOT
ALLOWED TO BREATHE
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EMPLOYEES ONLY.
YOU NEED TO SUPPLY
YOUR OWN
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MMB
BMF
RMN
HMR!

DOES ANYONE
UNDERSTAND
CARL?

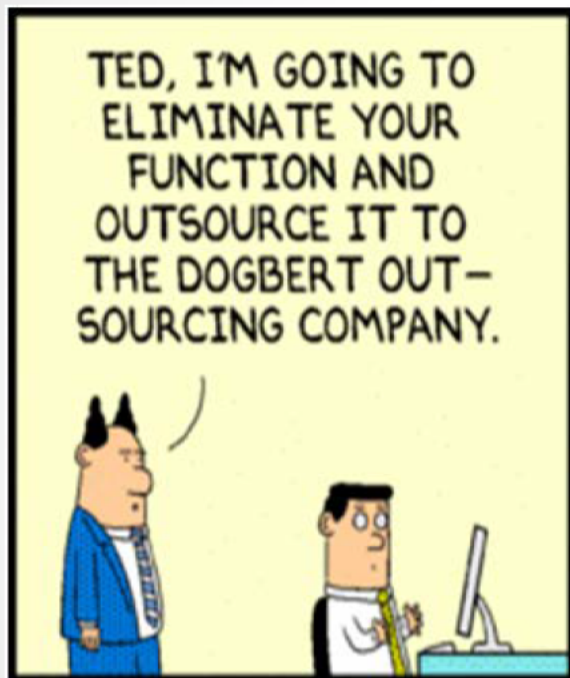
HEY! HE'S
USING OUR
LIGHT!



Inherently Governmental Functions



- Direction/control of federal employees
- Determination of budget policy, guidance and strategy
- Resource allocation or program management duties
- Approval of contractual documents or administering contracts
- Obliging Congressional authorized funding



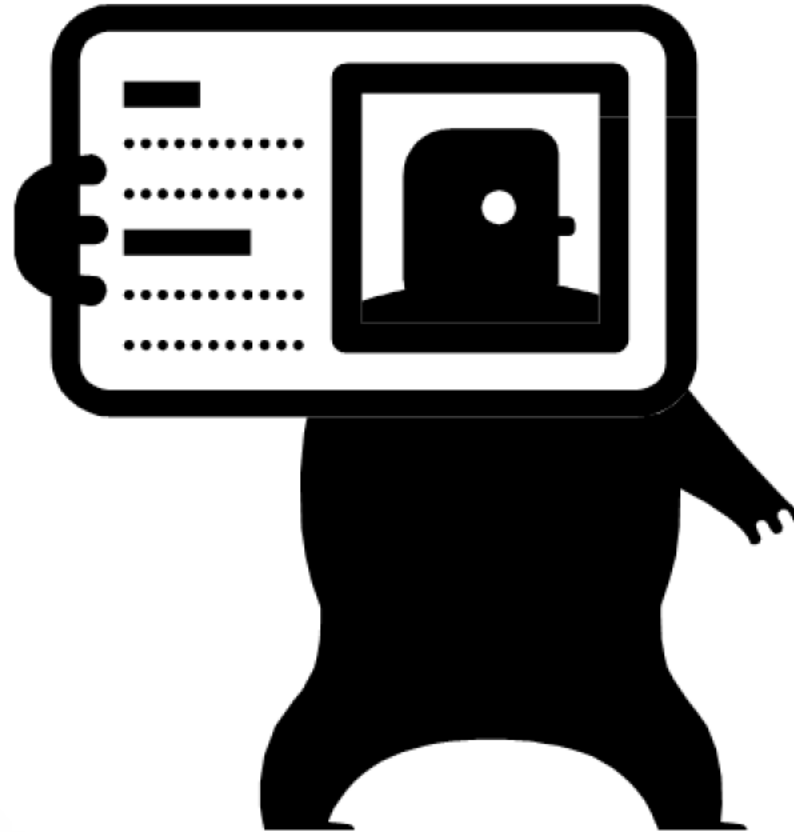
www.dilbert.com scottadams@aol.com



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Who's Who in the Workplace: Contractor ID



Contractor identification is key to avoiding problems

Protecting Sensitive Information

Guidelines for Protecting Sensitive Information

1. When you are in a **meeting** in which advanced acquisition or sensitive information is to be discussed, ensure you **know** who **the participants** are. If in doubt, ask!
2. Do not discuss sensitive information in **areas that are not secure** (e.g., bathrooms, hallways, cafeterias). Do not leave sensitive information where contractor personnel may observe it (i.e., your desk or work area).
3. **Proprietary information is releasable** to a contractor **only if** protected by appropriate contract clauses and non-disclosure agreements.
4. Do not place contractor personnel in a **position of liability for property** over which they have no contractual authority, accountability or control.
5. Do not delegate responsibility for **end-of-day security checks** to contractor personnel (unless their contract specifically allows it).
6. Consult your **legal counsel** if you have questions about releasing sensitive information. An attorney's advice is confidential and privileged.

Specific Situations



Inclement Weather Dismissals

- ☐ Government does not determine contractor leave policy
- ☐ Government generally does not compensate contractor for non-performance
- ☐ Contracting Officer will refer to the contract terms and conditions that address government down time

Telework

- ☐ If permitted by contract



Test Your Knowledge...

Specific Situations

Situation

Mary works for ABC Company and is under contract to provide consulting services. She has been doing an outstanding job in her position with ABC. As the government employee she supports, you want to recognize her for her above and beyond performance.

Question:

Can you give her a “Letter of Appreciation”?

Answer:



Do's

1. Remember: Contractor personnel are not government employees – different rules apply.
2. Ensure contractor personnel wear distinctive badges and can be easily identified - including E-mail correspondence and on the telephone.
3. Respect the employer-employee relationship between contractors and their employees.
4. Protect intellectual property rights when contractor work products are created or shared in the federal workplace.
5. Identify possible conflicts by contractor personnel to include violations of the law (including but not limited to Procurement Integrity statutes and regulations). Be sensitive to inappropriate appearances created by close relationships between government employees and contractor personnel.
6. As necessary, seek assistance from legal counsel in resolving these inappropriate relationships.

Do's

7. Safeguard sensitive information, including proprietary, Privacy Act and source selection information.
8. Clearly describe all contract taskings and ensure they are in-scope.
9. Maintain contact with on-site contractor personnel in order to assess performance and ascertain progress or delivery status. In an IPT environment, closer working relationships are needed; however, be careful to ensure only the contractor's task leader assigns taskings to individual contractor personnel.
10. "Zoom out" - Look at your situation from the contractor and contractor employee perspective.
 - Are you putting the employee in a difficult situation by asking for performance above or outside the contract?
 - Does your interaction with contractor personnel give the perception of favoritism?

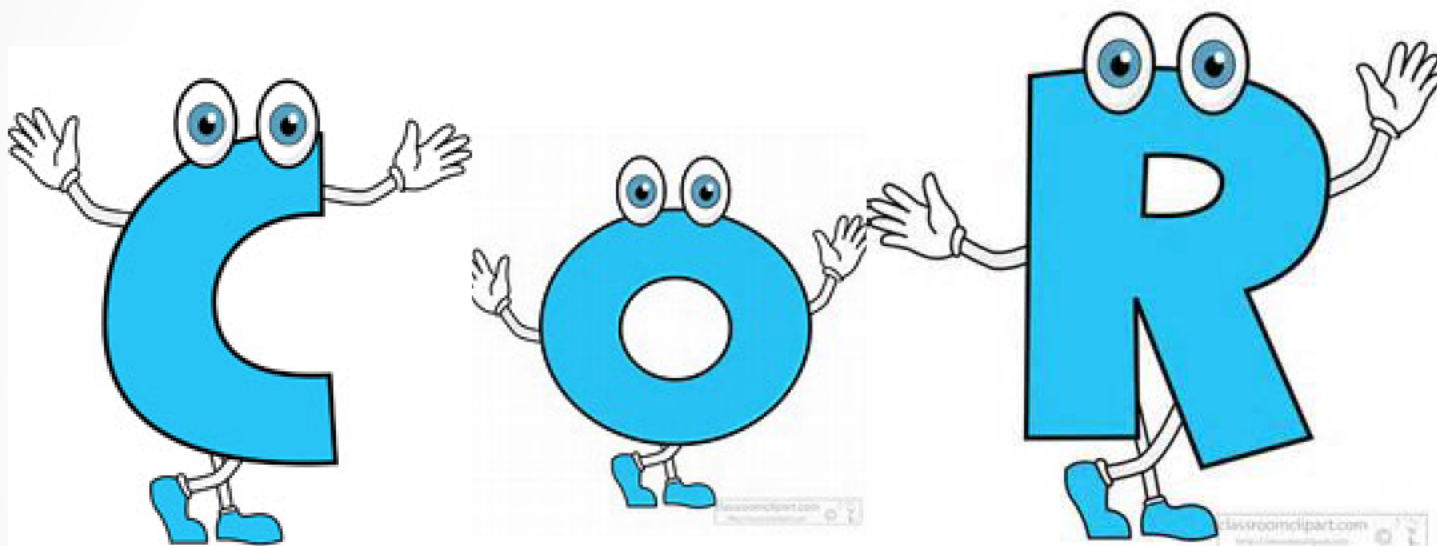
Don'ts

1. Don't become involved in the operations and policies of the contractor such as:
 - (a) Selecting, recruiting, hiring or firing contractor personnel
 - (b) Directing, scheduling, or critiquing individual contractor tasks on a continuous basis
 - (c) Supervising contractor personnel
 - (d) Pressuring the contractor to use “favorite” personnel, or insisting on particular personnel actions
2. Don't use government and contractor personnel interchangeably.
3. Don't require “out of scope” work, personal services, or “inherently governmental functions.” - there are no “and other duties as assigned”
4. Don't give the incumbent contractor unfair competitive advantage by including its personnel in meetings to discuss aspects of the re-competition, or by allowing access to planning information.
5. Don't solicit or accept gifts from contractor personnel.

Don'ts

6. Do not encourage contractor personnel to leave their workplace to attend a morale building activity, ask them to volunteer to organize morale building events, or participate in office gift-giving, funds, etc.
7. Do not give only one contractor AUTHORIZED/LEGALLY RELEASABLE information that may be of commercial value. If you share it with one, you must share it with all.

Questions and Answers



APPENDIX

FAC-COR References

- Revisions to the Federal Acquisition Certification for Contracting Officer's Representatives (FAC-COR) (OFPP Memo dated 9/6/2011)
- Federal Acquisition Institute's (FAI) FAC-COR Home Page (<https://www.fai.gov/drupal/certification/fac-cor>)
- FAC-COR Certification Requirements (http://www.fai.gov/drupal/pdfs/FAC-COR_20Sep2011.pdf)
- COR Training - Sample Curricula Recommendations (<https://www.fai.gov/drupal/sites/default/files/2014-9-1-COR-Training-Opportunities.pdf>)
- Verified COR Course Vendor Listing (<https://www.fai.gov/drupal/certification/verified-cor-course-vendor-listing>)

Points of Contact

[insert POC names here]



Individual Development Plan (IDP) Application Introduction to SF 182 for Employees

User Productivity Group (Jedi)

December 2014

Agenda

Overview of the Tool

- What is SF 182?
- SF 182 Roles
- Lifecycle of an SF 182

Demo

- Creating & Submitting an SF 182
- Recalling a Submitted SF 182
- Revising an SF 182
- Marking a Request as Complete

Questions

Overview

The Standard Form (SF) 182 is the Authorization, Agreement, and Certification form.

When an employee's IDP is approved for the current or next fiscal year and contains at least one activity that includes a cost, he or she will submit an SF 182.

Roles

Employee/ Requester:

- Creates, submits, edits SF 182 requests

Supervisor:

- Approves or Rejects SF 182 Requests

Approver(s):

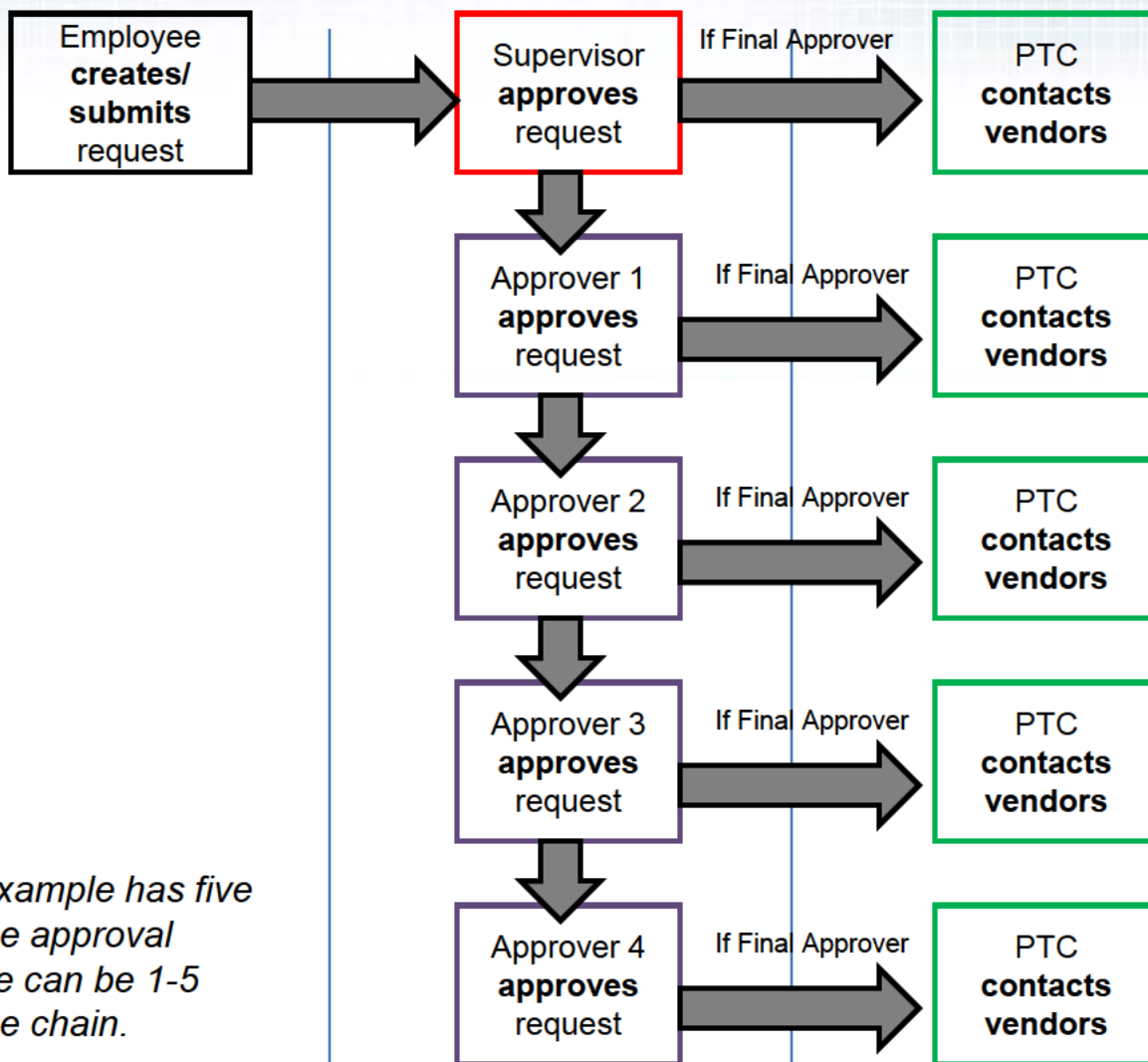
- Additional users in the approval chain who approve or reject SF 182 Requests

Purchasing Training Coordinator (PTC):

- Contacts relevant vendor(s) and adds billing and cost information to the SF 182 record.

Lifecycle of an SF 182 Request

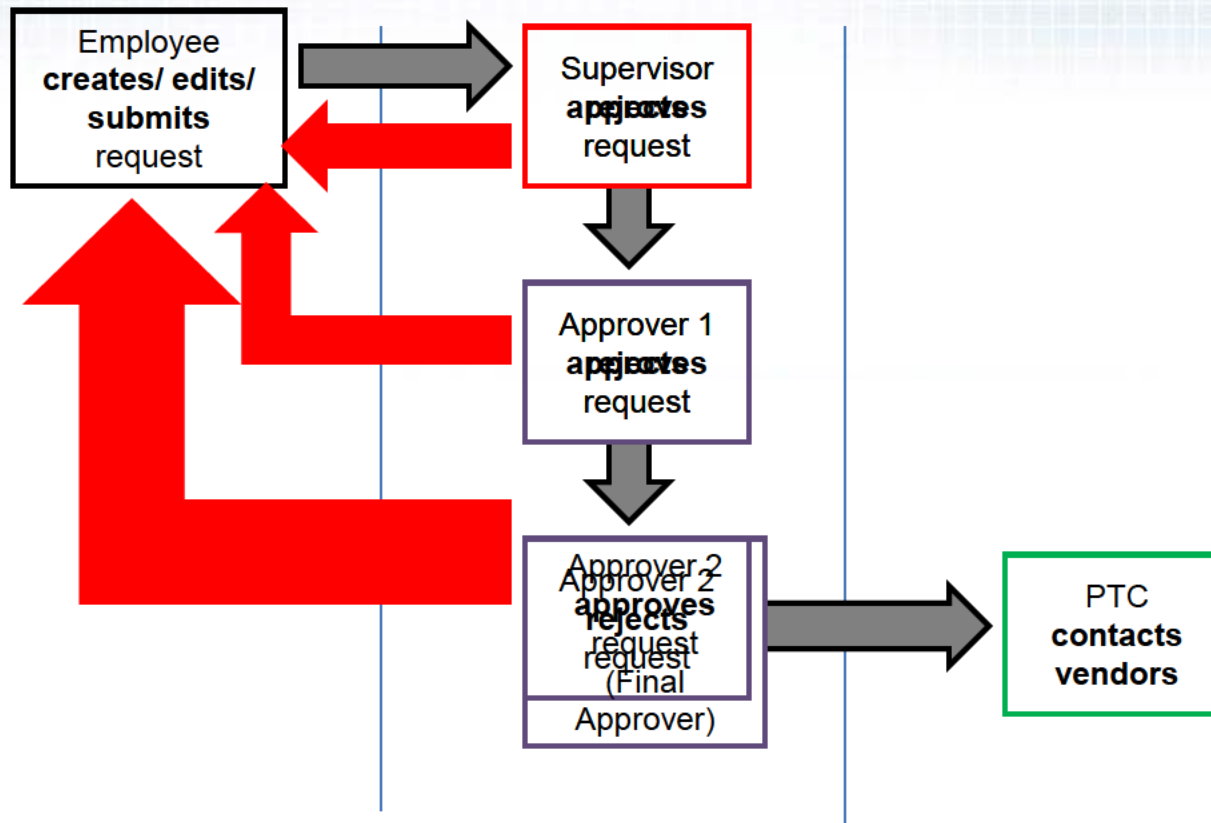
If everyone approves the request:



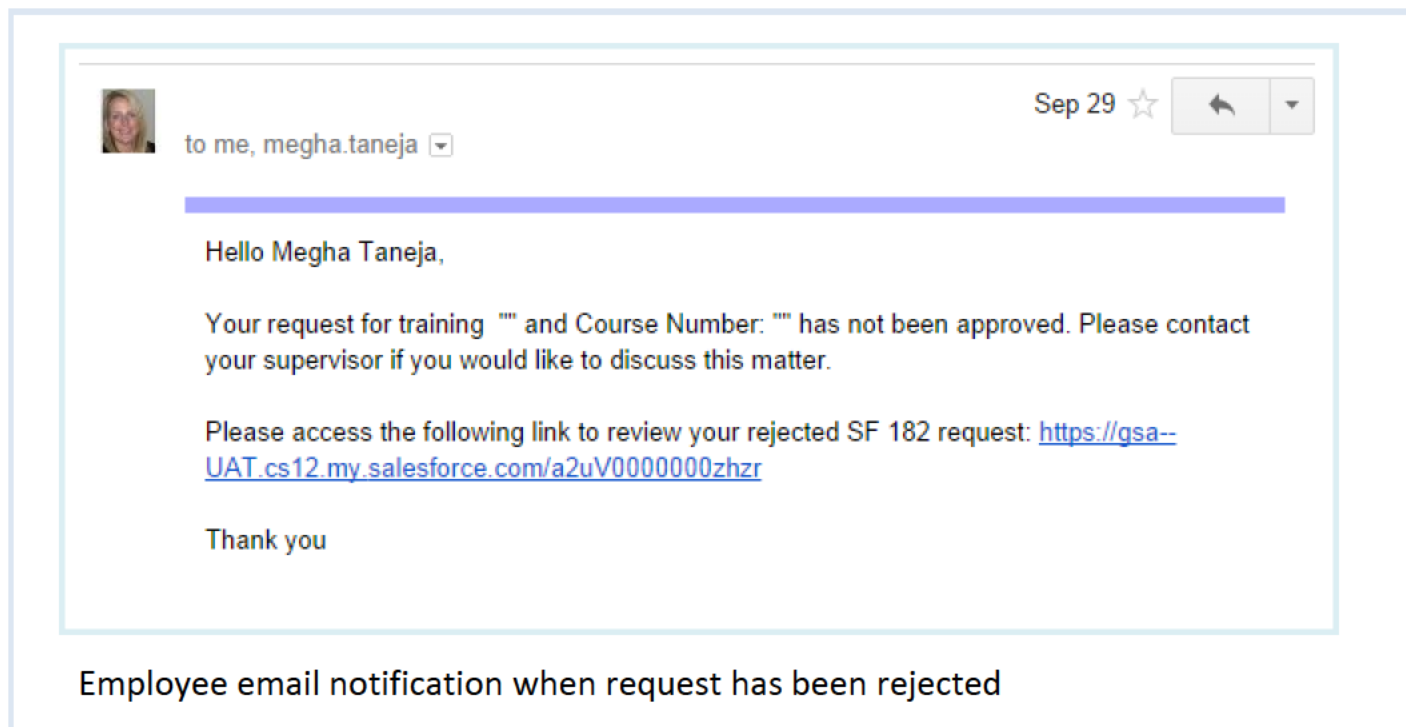
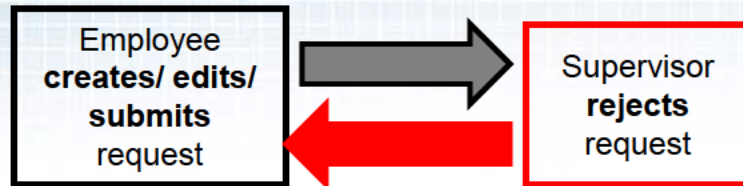
Note: this example has five people in the approval chain. There can be 1-5 people in the chain.

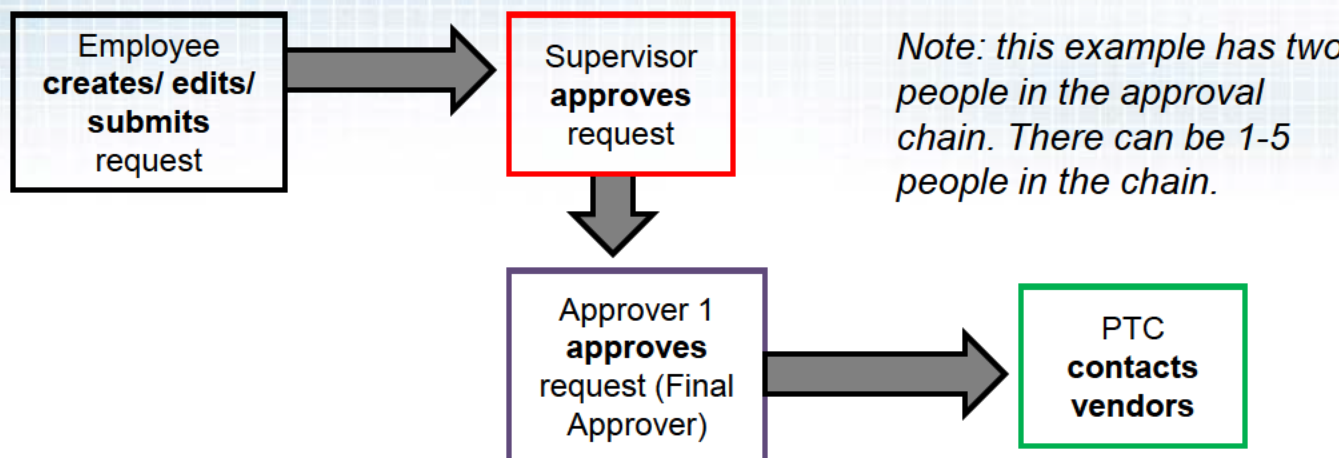
Lifecycle of an SF 182 Request

If someone rejects the request:



Note: this example has two people in the approval chain. There can be 1-5 people in the chain.





----- Forwarded message -----
From:
Date: Tuesday, September 30, 2014
Subject: Sandbox: SF 182 Request Approved and Funded
To: "anne.egan@gsa.gov" <anne.egan@gsa.gov>, "megha.taneja@gsa.gov" <megha.taneja@gsa.gov>

Hello Megha Taneja,

Your request for training has been approved and funded. Please verify the activity dates and block out the relevant dates/time in your calendar. Please be sure to select the 'Training Completed' checkbox within your SF 182 Request after you have completed the training.

Here is the link to access your training request: <https://gsa--UAT.cs12.my.salesforce.com/a2uV0000000ziDQ>

Thank you,

Employee/ Supervisor notification when request is updated by the PTC

Resources

[SF 182 Resources on InSite](#)

- User guides, training videos, and general IDP help

[IDP Resources Chatter Group](#)

- Great resource for asking questions and seeing what others have posted

Questions?



GSA Office of Administrative Services

June 1, 2015

MEMORANDUM FOR: Beatrice Dukes
Director, GSA Acquisition Workforce Division
Acquisition Career Manager, General Services Administration
Office Of Acquisition Policy (MV)

FROM: Bridgette Overbey
Branch Chief, Acquisition Workforce (H1BA)
Office of Administrative Services (H)

THRU: Ernesto Martinez
Director, Internal Acquisition Division (H1BA)
Office of Administrative Services (H)

SUBJECT: FAC-C Certification Determination for Lisa Ellis

(b) (6)

(b) (6)

Request for Quotations OPM3215T0003

Notification, Call Center, and Credit Monitoring and Identity Protection Services

1. Background

The Office of Personnel Management (OPM) Federal Investigative Services (FIS) performs work utilizing Personally Identifiable Information (PII) of individuals and provides notification, call center, and credit monitoring and identity protection services to individuals in the event of a breach that potentially compromises their PII.

2. Scope

OPM requires notification, call center, and credit monitoring and identity protection services to approximately 49,000 individuals whose personally identifiable information (PII) may have been exposed in a cybersecurity intrusion incident, with an option for contractor services to surge up to 100,000 individuals, as needed. The period of performance (POP) will be for 180 days and will include a contractor post-award conference immediately after contract award, and periodic contractor/OPM progress reviews at 30 day intervals. An end of POP wrap-up meeting will be held by OPM with the contractor to provide an understanding of achievements, final metrics and to provide for a conclusive summary of notification statistics and to remediate any non-contact issues.

3. Notification Requirements

Tracked, verified, notifications to the affected individuals identified by OPM. Notification services include:

- a. Notification of the PII breach incident by first class United States Postal Service mail using the OPM provided letter templates and contain OPM-supplied language concerning the breach and guidance on how to avoid being a victim. Notifications will be made using OPM-provided letterhead and the signature of OPM official(s) or by OPM-approved Contractor best practice. The letters shall also contain instructions on how to enroll in credit monitoring and identity protection, customer support contact information, and other pertinent details of the Contractor's services that are to be provided as described in C.6.;
- b. Tracking and a written record of all notifications made and attempted, including the date each notification was successfully delivered, to be provided to OPM on a cumulative basis weekly until all notifications have been completed or attempted as described in C.3.c.
- c. In those instances where the initial attempt to deliver notification fails, the Contractor shall make subsequent best efforts to deliver notification. The Contractor shall make no fewer than three attempts at notification within a 90 day period.
- d. Managed letter printing, mailing, and returned mail processing;
- e. 5-day standard turnaround from time of request to release of notification; and
- f. Address cleansing services: National Change of Address (NCOA) included with standard notification.

4. Call Center Support

Provide an expert response team to answer questions about the incident, reassure individuals, and explain the credit monitoring and identity protection services offered as described in C.5.

Call Center Support includes:

- a. Fully-managed, US-based call center support to answer questions, explain the credit monitoring and identity protection services, and connect customers to a licensed fraud investigator as needed.

- b. Client-branded customer experience specific to the incident, including call response times that average less than 5 minutes to connect the caller to a call center agent.
- c. Use of OPM-approved customized FAQs specific to the event.
- d. Agent training and quality assurance specific to the incident.
- e. English language support standard. Spanish language and disabled capability is desirable.
- f. Dedicated US toll-free telephone number.
- g. The contractor will provide weekly reports on call center volume, issue escalation, contact/non-contact/frustrated completion metrics and other key metrics the Contractor or OPM may deem necessary.
- h. Standard hours of operation: Monday-Saturday, 8am-8pm US Eastern Time.

5. Credit Monitoring and Identity Protection Requirements

OPM requires the Contractor to provide credit monitoring and identity protection services for the individuals whose PII was potentially breached (if the individual applies and activates it) for a period of 12-months from date of registration and include, at a minimum, the following services:

- 1. Both on-line and a dedicated OPM phone registration/enrollment for credit monitoring service plans;
- 2. Free 3-in-1 Credit Report;
- 3. Comprehensive credit file monitoring of credit reports from all three (3) credit bureaus, Equifax, Experian, and TransUnion;
- 4. Monitoring and automatic alerts of changes to credit reports from any of the three bureaus;
- 5. Wireless alerts and customizable alerts available;
- 6. 24/7 access to live agent customer service and support representatives to assist subject in understanding the content of the credit information, to provide personalized identity theft victim assistance, and to initiate an investigation for inaccurate information;
- 7. Assistance from fraud resolution representatives should there be a potential identity theft detected to help clear the problem from the individuals' credit; and
- 8. Identity theft insurance coverage in the amount of \$1,000,000 with no (0\$) deductible.

6. OPM provided Information

OPM will provide to the Contractor:

- 1. A list of the names and last known addresses of all individuals to whom notification must be made regarding potential compromise of their PII and credit reports (approximately 700).
- 2. A list of the names and last known addresses of affected individuals to whom to whom notification must be made regarding potential compromise of their PII but whose credit reports were not compromised (approximately 48,500).
- 3. Templates of two-page notification letters, one for the individuals described in C.6.1 and one for the individuals described in C.6.2., which will include OPM-supplied language concerning the breach and guidance on how to avoid being a victim within 5 days of BPA call order award. OPM letterhead and a signature (digital) of an OPM official will be provided as necessary per C.3.a.
- 4. OPM-approved Frequently Asked Questions (FAQs) to be used by Call Center agents.
- 5. PII dissemination from OPM to contractor will be minimized to further prevent inadvertent disclosures. Contractor will follow PII data breach as called out in section C.9. of this SOW.

7. Data Warranty

The Contractor warrants that personally identifiable information (PII) it collects regarding the use of the services by the affected individuals during the 12-month term of the credit monitoring will be safely stored and protected from unauthorized disclosure and destruction, either direct or as a result of

negligence. The Contractor shall, at the conclusion of the last enrollee's 12-month credit monitoring period, purge all PII provided by OPM to the Contractor, including any data stored as "back-up" material.

All PII obtained or created under this contract shall be properly secured and encrypted in the Contractor system and deleted from the Contractor's paper and electronic files, including backups, once notification is confirmed as completed and successful;

8. Contractor Deliverables

The contractor shall do the following under GSA contractor schedule 520-19:

The Contractor shall perform notification, call center, and credit monitoring and identity protection services as described in this SOW at sections C.3, C.4, and C.5, respectively.

Additionally, as called out in GSA schedule 520-19, OPM may use any and all of the tasks indicated below as called out in this SOW:

Data Breach Analysis Data Breach Analysis includes the monitoring and detection of breached identities and PII and PHI type of information across multiple industries in order to detect patterns of misuse related to a specific data loss. The breached files are continuously monitored over a period of weeks, months, or years. It can provide the locations of potential misuse for further law enforcement action, as well as a listing of consumers likely to be fraud victims. The tasks involved include but are not limited to the following:

- Monitoring of multiple non-credit data elements and sources
- Fraud detection and protection solutions
- Fraud resolution and assistance for affected individuals
- Fraud alerts
- Corrective actions
- Notification services
- Identity theft insurance (as allowed by applicable State statutes)
- Social Security Number monitoring
- Credit card monitoring

9. Additional Terms & Conditions

- I. Vendor providing these services shall not be owned or operated in whole or part, or otherwise affiliated with Altegrity or USIS or any of their subsidiaries, KeyPoint, or CACI.
- II. Contractor must report any suspected loss or compromise of PII, as defined in OMB M-10-23, to OPM within one hour and cooperate with OPM's inquiry into the incident and efforts to remediate any harm to potential victims.
 - a. Contractor must report the suspected loss or compromise of PII by its employees or sub-Contractors to the OPM Situation Room and to the OPM Contracting Officer's Representative (COR) or Contracting Officer within one (1) hour of the initial discovery.
 - b. The Contractor must develop and include in its security plan (which is submitted to OPM) an internal system by which its employees and sub-Contractors are trained to identify and report potential loss or compromise of PII.
 - c. The Contractor must provide a written report to OPM within 24 hours of the suspected loss or compromise of PII containing the following information:
 - i. Narrative, detailed description of the events surrounding the suspected loss/compromise
 - ii. Date, time, and location of the incident.
 - iii. Type of information lost or compromised.
 - iv. Contractor's assessment of the likelihood that the information was compromised or lost and the reasons behind the assessment.

- v. Names of person(s) involved, including victim, Contractor employee/sub-Contractor and any witnesses.
 - vi. Cause of the incident and whether the company's security plan was followed or not, and which specific provisions were not followed.
 - vii. Actions that have been or will be taken to minimize damage and/or mitigate further compromise.
 - viii. Recommendations to prevent similar situations in the future, including whether the security plan needs to be modified in any way and whether additional training may be required.
- III. The Contractor must cooperate with OPM or DHS/US-CERT inquiries into the suspected loss or compromise of PII.
- IV. At OPM's discretion, Contractor employees or sub-Contractor employees may be identified as no longer eligible to access PII or to work on that contract based on their actions related to the loss or compromise of PII.
- V. Data Breach Remediation Requirements
- a. The Contractor is responsible for reimbursing OPM for the cost of victim notice and remediation services procured as the result of a loss or compromise of PII, or as an alternative, procuring such services itself if OPM agrees.
- VI. The Contractor shall treat all deliverables under the contract as the property of OPM for which OPM shall have unlimited rights to use, dispose of, or disclose such data contained therein. The Contractor shall not retain, use, sell, or disseminate copies of any deliverable without the express permission of the Contracting Officer or Contracting Officer's representative.
- VII. The Contractor's invoicing, billing, and other financial/administrative records/databases may not store or include any sensitive government information, such as personally identifiable information (PII), created, obtained, or provided during the performance of the contract. It is acceptable to list the names, titles and contact information for the CO, COR, or other OPM personnel associated with the administration of the contract in the invoices as needed.
- VIII. The Contractor is required to obtain the Contracting Officer's approval prior to engaging in any contractual relationship (sub-contractor) in support of this contract requiring the disclosure of information, documentary material and/or records generated under, or relating to, this contract. The Contractor (and any sub-contractor) is required to abide by OPM guidance for protecting sensitive and proprietary information.

10 Quote Instructions & Award Criteria

Offerors must structure their pricing using the following pricing schedule and provide a timeline for the following major milestones:

1. Call Center Readiness (OPM will provide FAQs/Q&As on day of award)
2. Notification Mailing (OPM will provide letter templates and name/address list on day of award).

Offerors should refer to the service descriptions as provided in sections 3, 4 and 5 above to develop their quote. As part of their quote offerors must provide a cross walk from their quoted price to the associated pricing on their GSA schedule including any associated labor hour or other estimates as applicable. Offerors must also include a complete copy of their GSA contract along with their quote. **Quotes are due no later than 12:00 PM eastern time on Friday, December 12, 2014.** OPM will award a task order against the contractors GSA schedule 520-19 contract to the offeror who provides the best value to the government considering the milestone schedule and price. Quotes should be submitted by email to

james.thieme@opm.gov. OPM will not consider partial quotations. Contractors must provide pricing for all CLINS in order to be considered for an award.

Pricing Schedule

CLIN #	Item	Unit	Est. Quantity	Price Per Unit	TOTAL
001	Notification	Per person	49000	\$	\$
002	Call Center Support	Per Call	49000	\$	\$
003	Credit Monitoring and Identity Protection	Per Person	49000	\$	\$
ORDER TOTAL					\$

Attachment 1

OPM-Specific Clauses

1752.200-70 On-Site Working Conditions (July 2005)

(a) OPM facilities are smoking restricted workplaces. Due to the nature of the work, facilities, and requirements, contractor staff may only smoke outside in designated smoking areas.

(b) Normal operating hours are 7:00 am to 5:30 pm, Monday through Friday. Meeting task objectives within specific timeframes may require the working of extended/overtime hours. Any extended hours must be authorized in advance, and certified as worked by the task Government Project Manager(s).

(c) Government personnel observe the following days as holidays:

New Year's Day	January 1 *
Martin Luther King's Birthday	Third Monday in January
President's Day	Third Monday in February
Memorial Day	Last Monday in May
Independence Day	July 4*
Labor Day	First Monday in September
Columbus Day	Second Monday in October
Veterans Day	November 11
Thanksgiving Day	Fourth Thursday in November
Christmas Day	December 25*

* If the date falls on a Saturday, the Government holiday is the preceding Friday. If the date falls on a Sunday, the Government holiday is the following Monday.

(d) In addition to the days designated as holidays, the Government observes the following days:

- Any other day designated by Federal Statute
- Any other day designated by Executive Order
- Presidential Inauguration Day
- Any other day designated by the President's Proclamation

(e) It is understood and agreed between the Government and the Contractor that observance of such days by Government personnel shall not otherwise be a reason for an additional period of performance, or entitlement of compensation except as set forth within the contract. In the event the Contractor's personnel work during the holiday, they may be reimbursed by the Contractor, however, no form of holiday or other premium compensation will be reimbursed either as a direct or indirect cost, other than their normal compensation for the time worked. This provision does not preclude reimbursement for authorized overtime work if applicable to this contract.

(f) When the Federal, State, Local or other Governmental entity grants excused absence to its employees, assigned Contractor personnel may also be dismissed. The Contractor agrees to continue to provide sufficient personnel to perform critical tasks already in operation or scheduled, and must be guided by the instructions issued by the CO or COR.

(g) If Government personnel are unavailable due to furlough or any other reason, the Contractor must contact the CO or the COR to receive direction. It is the Government's decision as to whether the contract price/cost will be affected. Generally, the following situations apply:

(1) Contractor personnel who are able to continue contract performance (either on-site or at a site other than their normal workstation), must continue to work and the contract price shall not be reduced or increased.

(2) Contractor personnel who are not able to continue contract performance (e.g., support functions) may be asked to cease their work effort. This may result in a reduction to the contract price.

1752.204-70 Contractor Personnel Security Requirements (Jan 2008)

(a) The U.S. Office of Management and Budget (OMB) Memorandum M-05-24, referenced in paragraph (a) of FAR 52.204-9, Personal Identity Verification of Contractor Personnel, is available online at <http://www.whitehouse.gov/omb/memoranda/fy2005/m05-24.pdf>.

(b) The Government may require security clearances for performance of this contract. The Contractor must obtain these clearances before beginning work on the contract (OPM will not allow Contractor employees without clearance in any of its facilities). The Contractor must obtain these

clearances by using the eQIP system. If satisfactory security arrangements cannot be made with the Contractor, the required services must be obtained from other sources.

(c) The level of classified access required will be indicated on DD-254 or other appropriate form incorporated into each request requiring access to classified information. Contractors are required to have background investigations for suitability if they occupy positions of trust (e.g., systems administration) even if they do NOT have access to classified information.

(d) Necessary facility and/or staff clearances must be in place prior to start of work on the contract

(e) Contractors are responsible for the security, integrity and appropriate authorized use of their systems interfacing with the Government and or used for the transaction of any and all Government business. The Government, through the Government's Contracting Officer, may require the use or modification of security and/or secure communications technologies related to Government systems access and use.

(f) The Government, at its discretion, may suspend or terminate the access and/or use of any or all Government access and systems for conducting business with any/or all Contractors when a security or other electronic access, use or misuse issue gives cause for such action. The suspension or termination may last until such time as the Government determines that the situation has been corrected or no longer exists.

1752.205-70 Announcement of Contract Award (July 2006)

OPM complies with FAR 5.3, Synopses of Contract Awards, in terms of synopsisizing and publicly announcing contract awards. These actions take place at the time of, and not before, the contract is awarded. Contract award, in this case, means signature of the contractual document by the Contracting Officer and forwarding of the contractual document to the contract awardee. If the contract awardee wishes to make a separate public announcement, the awardee must obtain the approval of the Contracting Officer prior to releasing the announcement, and must plan to make announcement only after the contract has been awarded.

1752.209-70 Contractor Performance Capabilities (July 2005)

The Contractor must be capable of performing all the tasks described in the Statement of Work. The Government shall not be liable for any costs or other involvement in the purchase, repair, maintenance or replacement of Contractor items used to implement or comply with requirements of the contract. Likewise, the Government shall in no way be held accountable by the Contractor for the Contractor's inability to perform under this Contract due to Government technology implementations and or changes.

1752.209-71 Contractor's Key Personnel (July 2005)

(a) In order to ensure a smooth and orderly start up of work, it is essential that the key personnel specified in the Contractor's proposal be available on the effective date of the contract. If these personnel are not made available at that time, the Contractor must notify the Government Contracting Officer and show cause. If the Contractor does not show cause, the Contractor may be subject to default action.

(b) The Contractor shall not of its own will remove or replace any personnel designated as "key" personnel without the written concurrence of the cognizant Contracting Officer. Prior to utilizing employees other than specified personnel, the Contractor shall notify the Government Contracting Officer and the COR. This notification must be no later than five (5) calendar days in advance of any proposed substitution and must include justification (including resume(s) of proposed substitution(s)) in sufficient detail to permit evaluation of the impact on contract performance.

(c) Substitute personnel qualifications must be equal to, or greater than, those of the personnel being substituted. If the Government Contracting Officer and the COR determine that the proposed substitute personnel is unacceptable, or that the reduction of effort would be so substantial as to impair the successful performance of the work under the contract, the Contractor may be subject to default action. If deemed necessary by the Government, substitute personnel must be given a one-(1) day orientation by Contractor personnel at no additional cost to the Government and with no change in the delivery schedule.

(d) In the event that the performance of assigned Contractor personnel or any substitute(s) is determined by the Government to be unsatisfactory at any time during the life of the Contract, the Government reserves the right to request and receive satisfactory personnel replacement within five (5) calendar days of receipt by the Contractor of written notification.

Notification will include the reason for requesting replacement personnel.

(e) The Contractor-supplied personnel are employees of the Contractor and under the administrative control and supervision of the Contractor. The Contractor, through its personnel, shall perform the tasks prescribed herein. The Contractor must select, supervise, and exercise control and direction over its employees (including subcontractors) under this Contract. The Government shall not exercise any supervision or control over the Contractor in its performance of contractual services under this contract. The Contractor is accountable to the Government for the action of its personnel.

(f) The Contractor is herewith notified that employee recruiting and employee retention practices shall be monitored on a regular basis.

1752.209-72 Qualifications of Contractor's Employees (July 2005)

The Contracting Officer may require dismissal from work of those employees which he/she deems incompetent, careless, insubordinate, unsuitable or otherwise objectionable, or whose continued employment he/she deems contrary to the public interest or inconsistent with the best interest of national

security. The Contractor must fill out, and cause each of its employees on the contract work to fill out, for submission to the Government, such forms as may be necessary for security or other reasons. Upon request of the Contracting Officer, the Contractor's employees must be fingerprinted. Each employee of the Contractor who works on this contract shall be a citizen of the United States of America, or an alien who has been lawfully admitted for permanent residence as evidenced by Alien Registration Receipt Card Form 1-151, or who presents other evidence from the Immigration and Naturalization Service that employment will not affect his/her immigration status.

1752.209-73 Standards of Conduct (June 2006)

(a) Personnel assigned by the contractor to the performance of work under this order must be acceptable to the Government in terms of personal and professional conduct. Contractor personnel shall conform to standards of conduct as follows:

(1) No contractor employees shall solicit new business while performing work under this order.

(2) The contractor and its employees shall not discuss with unauthorized persons any information obtained in the performance of work under this order.

(b) Should the continued assignment to work under this order of any person in the contractor's organization be deemed by the Contracting Officer to conflict with the interests of the Government, that person shall be removed immediately from assignment, and the reason for removal shall be fully documented in writing by the Contracting Officer. Employment and staffing difficulties shall not be justification for failure to meet established schedules, and if such difficulties impair performance, the contractor may be subject to default.

1752.209-74 Organizational Conflicts of Interest (July 2005)

(a) The Contractor warrants that, to the best of the Contractor's knowledge and belief, there are no relevant facts or circumstances which could give rise to an organizational conflict of interest (OCI), as defined in FAR 9.5, Organizational and Consultants Conflicts of Interest, or that the Contractor has disclosed all such relevant information.

(b) The Contractor agrees that if an actual or potential OCI is discovered after award, the Contractor shall make a full disclosure in writing to the Contracting Officer. This disclosure must include a description of actions, which the Contractor has taken or proposes to take, after consultation with the Contracting Officer, to avoid, mitigate, or neutralize the actual or potential conflict.

(c) The Contracting Officer may terminate this contract for convenience, in whole or in part, if it deems such termination necessary to avoid an OCI. If the Contractor was aware of a potential OCI prior to award or discovered an actual or potential conflict after award and did not disclose or misrepresented

relevant information to the Contracting Office, the Government may terminate the contract for default, debar the Contractor from Government contracting, or pursue such other remedies as may be permitted by law or this contract.

(d) The Contractor must include this clause in all subcontracts and in lower tier subcontracts unless a waiver is requested from, and granted by, the Contracting Officer.

(e) In the event that a requirement changes in such a way as to create a potential conflict of interest for the Contractor, the Contractor must:

- (1) Notify the Contracting Officer of a potential conflict, and;
- (2) Recommend to the Government an alternate approach which would avoid the potential conflict, or
- (3) Present for approval a conflict of interest mitigation plan that will:
 - (i) Describe in detail the changed requirement that creates the potential conflict of interest; and
 - (ii) Outline in detail the actions to be taken by the Contractor or the Government in the performance of the task to mitigate the conflict, division of subcontractor effort, and limited access to information, or other acceptable means.
- (4) The Contractor must not commence work on a changed requirement related to a potential conflict of interest until specifically notified by the Contracting Officer to proceed.
- (5) If the Contracting Officer determines that it is in the best interest of the Government to proceed with work, notwithstanding a conflict of interest, a request for waiver must be submitted in accordance with FAR 9.503.

1752.209-75 Reducing Text Messaging While Driving (Oct 2009)

(a) In accordance with Section 4 of the Executive Order, “Federal Leadership on Reducing Text Messaging While Driving,” dated October 1, 2009, you are hereby encouraged to:

- (1) Adopt and enforce policies that ban text messaging while driving company-owned or -rented vehicles or Government-owned, -leased or -rented vehicles, or while driving privately-owned vehicles when on official Government business or when performing any work for or on behalf of the Government; and
- (2) Consider new company rules and programs, and reevaluating existing programs to prohibit text messaging while driving, and conducting education, awareness, and other outreach for company employees about the safety risks associated with texting while driving. These initiatives should encourage voluntary compliance with the company’s text messaging policy while off duty.

(b) For purposes of complying with the Executive Order:

(1) "Texting" or "Text Messaging" means reading from or entering data into any handheld or other electronic device, including for the purpose of SMS texting, e-mailing, instant messaging, obtaining navigational information, or engaging in any other form of electronic data retrieval or electronic data communication.

(2) "Driving" means operating a motor vehicle on an active roadway with the motor running, including while temporarily stationary because of traffic, a traffic light or stop sign, or otherwise. It does not include operating a motor vehicle with or without the motor running when one has pulled over to the side of, or off, an active roadway and has halted in a location where one can safely remain stationary.

1752.219-70 Small Business Subcontracting Plan (Feb 2013)

(a) If your company is required to file a Small Business Subcontracting Plan in accordance with FAR 52.219-9, please use the Subcontracting Plan Template attached to this solicitation for that purpose.

(b) The on-line Electronic Subcontracting Reporting System (eSRS) must now be used for input of the reports required by FAR 52.219-9(d)(10)(iii). To comply with this requirement, please do the following:

(1) If your company does not yet have an eSRS account, then please sign up for one at www.esrs.gov. A user guide that explains how to use eSRS is available at: http://esrs.gov/documents/esrs_contractor_user_guide_1.7.pdf. If you notice that your company contact information or DUNS number in eSRS are not correct, then please make corrections through the System for Award Management (SAM) website at <http://www.sam.gov/>. That data will then flow from the SAM to the Federal Procurement Data System – Next Generation (FPDS-NG) and then finally into the eSRS system. Repopulation of your eSRS contact info can take two business days after you make corrections in the SAM. Please include the e-mail addresses of the contracting officer in eSRS for notification in block 13 of the report.

(2) Starting with fiscal year 2005, submit your Summary Subcontracting Reports (SSRs – Old SF 295) and your Individual Subcontracting Reports (ISRs – Old SF 294) for contracts into the eSRS. Midyear reports are not required in eSRS for FY 2004 and 2005.

(3) For fiscal year 2006 onward also submit your midyear (March) ISRs into eSRS.

(4) If you have not yet submitted a final report for any contracts closed during FY 2004 onward, you should do so now using the eSRS.

(5) Please continue to submit to the Contracting Officer paper prints of all the reports you input to eSRS, until further notice. (This continues to be a FAR requirement)

(6) If you have a Blanket Purchase Agreement (BPA) with OPM, please submit your ISRs via paper. FPDS-NG, which provides data into eSRS, does not identify subcontracting plans resulting from BPAs and other types of orders.

1752.222-70 Notice of Requirement for Certification of Nonsegregated Facilities (July 2005)

By signing this offer or contract, the contractor will be deemed to have signed and agreed to the provisions of Federal Acquisition Regulations (FAR) Clause 52.222-21, Certification of Nonsegregated Facilities, incorporated by reference in this solicitation/contract. The certification provides that the bidder or offeror does not maintain or provide for its employees, facilities which are segregated on a basis of race, color, religion, or national origin, whether such facilities are segregated by directive or on a de facto basis. The certification also provides that the bidder/offeror does not and will not permit its employees to perform their services at any location under its control where segregated facilities are maintained. FAR Clause 52.222-21 must be included in all subcontracts as well.

1752.222-71 Special Requirements for Employing Special Disabled Veterans, Veterans of the Vietnam Era, and Other Eligible Veterans (July 2005)

(a) If this contract contains FAR Clause 52.222-35 (Equal Opportunity for Special Disabled Veterans, Veterans of the Vietnam Era, and Other Eligible Veterans), your company must comply with the requirements of this clause, including the listing of employment opportunities with the local office of the state employment service system.

(b) If this contract contains FAR clauses 52.222-37 (Employment Reports on Special Disabled Veterans, Veterans of the Vietnam Era, and Other Eligible Veterans) or 52.222-38 (Compliance with Veterans' Employment Reporting Requirements), you are reminded that your company must comply with the special reporting requirements described in those clauses. Your company must submit information on several aspects of its employment and hiring of special disabled and Vietnam era veterans or other veterans who served on active duty during a war or in a campaign or expedition for which a campaign badge has been authorized. You must submit this information no later than September 30 of each year, in the "Federal Contractor Veterans' Employment Report" or VETS-100 Report. The U.S. Department of Labor has established a web site for submitting this report. The address is:
<http://www.vets100.cudenver.edu>.

1752.223-70 Electronic Product Environmental Assessment Tool (EPEAT)-Registered Electronic Products (Feb 2013)

(a) Electronic Product Environmental Assessment Tool (EPEAT) is a tool to help purchasers evaluate, compare and select computer desktops, laptops, notebooks, computer monitors and imaging equipment based on their environmental attributes. To obtain additional information regarding EPEAT-registered electronic products, go to <http://www.epeat.net>.

(b) FAR 52.223-9, IEEE 1680 Standard for the Environmental Assessment of Personal Computer Products, requires that at all of the electronic products that the agency acquires under this Information Technology (IT) contract to meet the agency's requirements must be EPEAT Bronze-registered or higher electronic products.

(c) By signing this offer or contract, the contractor will be deemed to have signed and agreed that all of the electronic products that the contractor provides under this contract are EPEAT Bronze-registered or higher electronic products.

1752.223-71 Environmentally Preferable Products and Services (Feb 2013)

(a) Executive Order 13423, Strengthening Federal Environmental, Energy, and Transportation Management, requires in agency acquisitions of goods and services (i) use of sustainable environmental practices, including acquisition of biobased, environmentally preferable, energy-efficient, water-efficient, and recycled-content products, and (ii) use of paper of at least 30 percent post-consumer fiber content.

(b) By signing this offer or contract, the contractor will be deemed to have signed and agreed that all goods and services provided under this contract will comply with the above requirements of Executive Order 13514.

1752.224-70 Protecting Personally Identifiable Information (Nov 2012)

(a) Applicability

This clause applies to contractor personnel and addresses specific OPM requirements in addition to those included in the Privacy Act of 1974 (5 U.S.C. 552a - the Act). The following should not be construed to alter or diminish civil and/or criminal liabilities provided under the Act.

(b) Definition of Personally Identifiable Information (PII)

Personally Identifiable Information (PII) is information that can be used to discern or trace a person's identity, such as name, social security number, biometric records, and that combined with other information, can be used to compromise the integrity of agency records relating to a person, by permitting access to unauthorized disclosure of these records. For example, a name alone would generally not constitute PII, but when linked to his or her social security number, date of birth, or mother's maiden name, would constitute PII. In other words, **PII** refers to any information, on any medium, that **identifies a specific individual** whether the information is on paper or electronic.

(c) Contract employees shall not remove PII from their individual assigned duty station without prior approval of their supervisor.

(d) All contract employees are personally responsible for the proper handling of PII, regardless of location. All contract employees must be:

- Responsible for the proper control and handling of PII residing on their computer, on removable media, and on paper documents.

- Responsible for ensuring portable data storage and communication devices are properly controlled and secured at all times and ensuring the use FIPS 140-2 compliant encryption to protect information stored on digital media during transport outside of OPM controlled areas.
- Responsible for ensuring PII data at rest is encrypted in contractor and government Cloud computing environments.
- Responsible for the proper marking, control and storage of printouts and other paper documents containing PII in their possession.

(e) OPM has a policy protecting, and when appropriate, restricting sending, copying or moving PII from the OPM network. Therefore, if the contract employees must send PII, it is the responsibility of the contractor to ensure the PII is not inadvertently disclosed to unauthorized individuals. PII must not be sent in the body of an email. Attachments containing PII must be encrypted.

(f) IT Security Incident and PII Breach Protection and Notification

All security incidents that involve OPM information or information systems must be reported to the OPM Situation Room. Contractors must also report incidents to the OPM Contracting Officer. This reporting must occur immediately upon discovery of the incident. Incidents and breaches must be reported, even if it is believed the breach is limited, small, or insignificant. OPM's IT security experts will determine when a breach needs additional focus and attention. The OPM Situation Room is available 24 hours per day, 365 days per year. Report the breach to the OPM Situation Room and the Contracting Officer either by phone or by e-mail; however, be sure NOT to include PII in the e-mail.

1. OPM contractors must report a breach or potential security breach to the OPM Situation Room at: sitroom@opm.gov, (202) 418-0111, Fax (202) 606-0624.
2. When notifying the Situation Room, copy the Contracting Officer.
3. If you have questions regarding these procedures, contact the Contracting Officer.

1752.224-71 Freedom of Information Act Requests (Sep 2009)

(a) Offerors are reminded that information furnished under this solicitation may be subject to disclosure under the Freedom of Information Act (FOIA). Therefore:

(1) All items that are confidential to business, or contain trade secrets, proprietary, or personnel information must be clearly marked in all documents submitted to the U.S. Office of Personnel Management (OPM or The Government). Marking of items will not necessarily preclude disclosure when the OPM determines disclosure is warranted by FOIA. However, if such items are not marked, all information contained within the submitted documents will be deemed to be releasable.

(2) No later than five (5) business days after award of a contract, blanket purchase agreement (BPA), or order, the Contractor must provide OPM a redacted copy of the contract/BPA/order in electronic format. This copy will be used to satisfy any requests for copies of the contract/BPA/order under the FOIA. If the Contracting Officer believes that any redacted information does not require protection from public release, the issue will be resolved in accordance with paragraph 3.104-4(d) of the Federal Acquisition Regulation.

(b) Any information made available to the Contractor by the Government must be used only for the purpose of carrying out the provisions of this contract and must not be divulged or made known in any manner to any person except as may be necessary in the performance of the contract.

(c) In performance of this contract, the Contractor assumes responsibility for protection of the confidentiality of Government records and must ensure that all work performed by its subcontractors shall be under the supervision of the Contractor or the Contractor's responsible employees.

(d) Each officer or employee of the Contractor or any of its subcontractors to whom any Government record may be made available or disclosed must be notified in writing by the Contractor that information disclosed to such officer or employee can be used only for a purpose and to the extent authorized herein, and that further disclosure of any such information, by any means, for a purpose or to an extent unauthorized herein, may subject the offender to criminal sanctions imposed by 19 U.S.C. 641. That section provides, in pertinent part, that whoever knowingly converts to their use or the use of another, or without authority, sells, conveys, or disposes of any record of the United States or whoever receives the same with intent to convert it to their use or gain, knowing it to have been converted, shall be guilty of a crime punishable by a fine of up to \$10,000, or imprisoned up to ten years, or both.

1752.228-70 Insurance (July 2005)

(a) In accordance with FAR 52.228-5, "Insurance-Work on a Government Installation (JAN 1997)" incorporated by reference, the Contractor must secure, pay the premiums for and keep in force until the expiration of this contract, and any renewal thereof, adequate insurance of the types and in the amounts as specified under FAR 28.3.

(b) Each policy of insurance must contain an endorsement that any cancellation or material change in the coverage adversely affecting the Government's interest must not be effective unless the insurer or the Contractor gives written notice of cancellation or change, as required by the CO. When the coverage is provided by self-insurance, the Contractor shall not change or decrease the coverage without the CO's prior approval.

(c) A certificate of each policy of insurance must be furnished to the CO within ten (10) days after notice of award certifying, among other things, that the policy contains the aforementioned endorsement. The insurance company providing the above insurance must be satisfactory to the Government. Notices of policy changes shall be furnished to the CO. The substance of this clause must be made to flow down to any subcontractors.

1752.232-70 Invoice Requirements Large Business (Oct 2012)

(a) A proper invoice must include the following items (except for interim payments on cost reimbursement contracts for services):

(1) Name and address of the contractor.

(2) Invoice date and invoice number. (Contractors should date invoices as close as possible to the date of transmission.)

(3) Contract number or other authorization for supplies delivered or services performed (including order number and contract line item number).

(4) Description, quantity, unit of measure, unit price, and extended price of supplies delivered or services performed.

(5) Shipping and payment terms (*e.g.*, shipment number and date of shipment, discount for prompt payment terms). Bill of lading number and weight of shipment will be shown for shipments on Government bills of lading.

(6) Name and address of contractor official to whom payment is to be sent (must be the same as that in the contract or in a proper notice of assignment).

(7) Name (where practicable), title, phone number, and mailing address of person to notify in the event of a defective invoice.

(8) Taxpayer Identification Number (TIN). The contractor must include its TIN on the invoice only if required by agency procedures. (See 4.9 TIN requirements.)

(9) Electronic funds transfer (EFT) banking information.

(i) The contractor shall have submitted correct EFT banking information in accordance with the applicable solicitation provision (*e.g.*, 52.232-38, Submission of Electronic Funds Transfer Information with Offer), contract clause (*e.g.*, 52.232-33, Payment by Electronic Funds Transfer-Central Contractor Registration, or 52.232-34, Payment by Electronic Funds Transfer-Other Than Central Contractor Registration), or applicable agency procedures.

(ii) The last four digits of the contractor's bank account must be shown on each invoice submitted for payment. This information will be used as a cross-reference in situations where the EFT banking information in the Central Contract Registration is suspect.

(iii) EFT banking information is not required if the Government waived the requirement to pay by EFT.

(10) The vendor's certification that their EFT banking information in the Central Contractor Registration is current, accurate and complete as of the date of the invoice.

(11) Any other information or documentation required by the contract (*e.g.*, evidence of shipment).

(b) Any invoice that does not contain all of the information listed in paragraph (a) above will be rejected as improper, and a new complete corrected invoice must be submitted. The payment due date for the corrected invoice will be calculated from the date it is received in the Prompt Pay e-mail box.

(c) ALL large business invoices—without exception—must have unique identifying numbers, and be submitted via e-mail to OPM's Prompt Pay e-mail box at:

PromptPay@opm.gov

Please note that OPM cannot guarantee payment of invoices sent by any other means, such as regular mail or e-mail to other addresses.

(d) Please attach only one invoice to each e-mail, and use the following format for the subject line of the e-mail:

<Contractor name>&<Invoice no>&<Amount>&<Contract Number>/<Call or Order Number>

Example:

ABC Co&AB-1298433&10000.00&OPM00-00-X-0000/X0000

(e) Payment due dates will only be calculated from the date that invoices are received in the Prompt Pay e-mail box.

(f) Inquiries regarding payment of invoices should be e-mailed to InvoiceInquiries@opm.gov. The relevant invoice must be attached to the inquiry e-mail, and the subject line of the e-mail must state "INQUIRY," followed by the information described in paragraph (d) above.

Example:

INQUIRY: ABC Co&AB-1298433&10000.00&OPM00-00-X-0000/X0000

Do NOT use the Prompt Pay e-mail box for inquiries.

(g) If the supplies, services, technical or other reports are rejected for failure to conform to the technical requirements of the contract, or for damage in transit or otherwise, the invoice will be rejected and returned to the Contractor.

1752.232-71 Method of Payment (July 2005)

(a) Payments under this contract will be made either by check or by wire transfer through the Treasury Financial Communications System at the option of the Government.

(b) The Contractor must forward the following information in writing to the Contracting Officer not later than seven (7) days after receipt of notice of award:

(1) Full Name (where practicable), title, telephone number, and complete mailing address of responsible official(s):

(i) to whom check payments are to be sent, and

(ii) who may be contacted concerning the bank account information requested below.

(2) The following bank account information required to accomplish wire transfers:

(i) Name, address, and telegraphic abbreviation of the receiving financial institution.

(ii) Receiving financial institution's 9-digit American Bankers Association (ABA) identifying number for routing transfer of funds. (Provide this number only if the receiving financial institution has access to the Federal Reserve Communications System.)

(iii) Recipient's name and account number at the receiving financial institution to be credited with the funds. If the receiving financial institution does not have access to the Federal Reserve Communications System, provide the name of the correspondent financial institution through which the receiving institution receives electronic funds transfer messages. If a correspondent financial institution is specified, also provide:

(A) Address and telegraphic abbreviation of the correspondent financial institution.

(B) The correspondent financial institution's 9-digit ABA identifying number for routing transfer of funds.

(c) Any changes to the information furnished under paragraph (b) of this clause shall be furnished to the Contracting Officer in writing at least 30 days before the effective date of the change. It is the Contractor's responsibility to furnish these changes promptly to avoid payments to erroneous addresses or bank accounts.

(d) The document furnishing the information required in paragraphs (b) and (c) must be dated and contain the signature, title, and telephone number of the Contractor official authorized to provide it, as well as the Contractor's name and contract number

1752.232-72 Limitation of Government's Obligation (May 2009)

(a) Contract line item(s) through are incrementally funded. For these item(s), the sum of \$ of the total price is presently available for payment and allotted to this contract. An allotment schedule is set forth in paragraph (j) of this clause.

(b) For item(s) identified in paragraph (a) of this clause, the Contractor agrees to perform up to the point at which the total amount payable by the Government, including reimbursement in the event of termination of those item(s) for the Government's convenience, approximates the total amount currently allotted to the contract. The Contractor is not authorized to continue work on those item(s) beyond that point. The Government will not be obligated in any event to reimburse the Contractor in excess of the amount allotted to the contract for those item(s) regardless of anything to the contrary in the clause entitled "Termination for Convenience of the Government." As used in this clause, the total amount payable by the Government in the event of termination of applicable contract line item(s) for convenience includes costs, profit, and estimated termination settlement costs for those item(s).

(c) Notwithstanding the dates specified in the allotment schedule in paragraph (j) of this clause, the Contractor will notify the Contracting Officer in writing at least thirty days prior to the date when, in the Contractor's best judgment, the work will reach the point at which the total

amount payable by the Government, including any cost for termination for convenience, will approximate 85 percent of the total amount then allotted to the contract for performance of the applicable item(s). The notification will state (1) the estimated date when that point will be reached and (2) an estimate of additional funding, if any, needed to continue performance of applicable line items up to the next scheduled date for allotment of funds identified in paragraph (j) of this clause, or to a mutually agreed upon substitute date. The notification will also advise the Contracting Officer of the estimated amount of additional funds that will be required for the timely performance of the item(s) funded pursuant to this clause, for a subsequent period as may be specified in the allotment schedule in paragraph (j) of this clause or otherwise agreed to by the parties. If after such notification additional funds are not allotted by the date identified in the Contractor's notification, or by an agreed substitute date, the Contracting Officer will terminate any item(s) for which additional funds have not been allotted, pursuant to the clause of this contract entitled "Termination for Convenience of the Government."

(d) When additional funds are allotted for continued performance of the contract line item(s) identified in paragraph (a) of this clause, the parties will agree as to the period of contract performance which will be covered by the funds. The provisions of paragraphs (b) through (d) of this clause will apply in like manner to the additional allotted funds and agreed substitute date, and the contract will be modified accordingly.

(e) If, solely by reason of failure of the Government to allot additional funds, by the dates indicated below, in amounts sufficient for timely performance of the contract line item(s) identified in paragraph (a) of this clause, the Contractor incurs additional costs or is delayed in the performance of the work under this contract and if additional funds are allotted, an equitable adjustment will be made in the price or prices (including appropriate target, billing, and ceiling prices where applicable) of the item(s), or in the time of delivery, or both. Failure to agree to any such equitable adjustment hereunder will be a dispute concerning a question of fact within the meaning of the clause entitled "Disputes."

(f) The Government may at any time prior to termination allot additional funds for the performance of the contract line item(s) identified in paragraph (a) of this clause.

(g) The termination provisions of this clause do not limit the rights of the Government under the clause entitled "Default." The provisions of this clause are limited to the work and allotment of funds for the contract line item(s) set forth in paragraph (a) of this clause. This clause no longer applies once the contract is fully funded except with regard to the rights or obligations of the parties concerning equitable adjustments negotiated under paragraphs (d) and (e) of this clause.

(h) Nothing in this clause affects the right of the Government to terminate this contract pursuant to the clause of this contract entitled "Termination for Convenience of the Government."

(i) Nothing in this clause shall be construed as authorization of voluntary services whose acceptance is otherwise prohibited under 31 U.S.C. 1342.

(j) The parties contemplate that the Government will allot funds to this contract in accordance with the following schedule:

On execution of contract	\$ _____
(month) (day), (year)	\$ _____
(month) (day), (year)	\$ _____
(month) (day), (year)	\$ _____

1752.232-73 Small Business Invoice Requirements (October 2012)

(a) A proper invoice must include the following items (except for interim payments on cost reimbursement contracts for services):

- (1) Name and address of the contractor.
- (2) Invoice date and invoice number. (Contractors should date invoices as close as possible to the date of transmission.)
- (3) Contract number or other authorization for supplies delivered or services performed (including order number and contract line item number).
- (4) Description, quantity, unit of measure, unit price, and extended price of supplies delivered or services performed.
- (5) Shipping and payment terms (*e.g.*, shipment number and date of shipment, discount for prompt payment terms). Bill of lading number and weight of shipment will be shown for shipments on Government bills of lading.
- (6) Name and address of contractor official to whom payment is to be sent (must be the same as that in the contract or in a proper notice of assignment).
- (7) Name (where practicable), title, phone number, and mailing address of person to notify in the event of a defective invoice.
- (8) Taxpayer Identification Number (TIN). The contractor must include its TIN on the invoice only if required by agency procedures. (See 4.9 TIN requirements.)
- (9) Electronic funds transfer (EFT) banking information.
 - (i) The contractor shall have submitted correct EFT banking information in accordance with the applicable solicitation provision (*e.g.*, 52.232-38, Submission of Electronic Funds Transfer Information with Offer), contract clause (*e.g.*, 52.232-33, Payment by Electronic Funds Transfer-Central Contractor Registration, or 52.232-34, Payment by Electronic Funds Transfer-Other Than Central Contractor Registration), or applicable agency procedures.
 - (ii) The last four digits of the contractor's bank account must be shown on each invoice submitted for payment. This information will be used as a cross-reference in situations where the EFT banking information in the Central Contract Registration is suspect.
 - (iii) EFT banking information is not required if the Government waived the requirement to pay by EFT.
- (10) The vendor's certification that their EFT banking information in the Central Contractor Registration is current, accurate and complete as of the date of the invoice.
- (11) Any other information or documentation required by the contract (*e.g.*, evidence of shipment).

(b) Any invoice that does not contain all of the information listed in paragraph (a) above will be rejected as improper, and a new complete corrected invoice must be submitted. The payment due date for the corrected invoice will be calculated from the date it is received in the Prompt Pay e-mail box.

(c) ALL small business invoices—without exception—must have unique identifying numbers, and be submitted via e-mail to OPM’s Small Business Invoice e-mail box at:

SmallBusinessInvoices@opm.gov

Please note that OPM cannot guarantee payment of invoices sent by any other means, such as regular mail or e-mail to other addresses.

(d) Please attach ONLY one invoice to each e-mail, and use the following format for the subject line of the e-mail:

<Contractor name>&<Invoice no>&<Amount>&<Contract Number>/<Call or Order Number>

Example:

ABC Co&AB-1298433&10000.00&OPM00-00-X-0000/X0000

(e) Payment due dates will only be calculated from the date that invoices are received in the Small Business Invoice e-mail box.

(f) Inquiries regarding payment of invoices should be e-mailed to InvoiceInquiries@opm.gov. The relevant invoice must be attached to the inquiry e-mail, and the subject line of the e-mail must state “INQUIRY,” followed by the information described in paragraph (d) above.

Example:

INQUIRY: ABC Co&AB-1298433&10000.00&OPM00-00-X-0000/X0000

Do NOT use the Prompt Pay e-mail box for inquiries.

(g) If the supplies, services, technical or other reports are rejected for failure to conform to the technical requirements of the contract, or for damage in transit or otherwise, the invoice will be rejected and returned to the Contractor.

1752.232-74 Providing Accelerated Payment to Small Business Subcontractors (Oct 2012)

(a) This clause implements the temporary policy provided by OMB Policy Memorandum M-12-16, Providing Prompt Payment to Small Business Subcontractors, dated July 11, 2012. (Note: OMB

Policy Memorandum M-12-16 is accessible on line at:
<http://www.whitehouse.gov/sites/default/files/omb/memoranda/2012/m-12-16.pdf>.)

- (b) Upon receipt of accelerated payments from the Government, the contractor is required to pay all small business subcontractors on an accelerated timetable to the maximum extent practicable after receipt of invoice and all proper documents.
- (c) Include the substance of this clause, including this paragraph (b), in all subcontracts with small business.

1752.233-70 OPM Protest Procedures [Applicable to Solicitations Only] (Dec 2010)

(a) An interested party who files a protest with OPM has the option of requesting review and consideration of the protest by either the Contracting Officer (CO) or the Senior Procurement Executive (SPE). The protest must clearly indicate the official to whom it is directed.

(b) If the protest is directed to the SPE, a copy of the protest must be sent to the Director of the Contracting Group at the same time the protest is filed with the CO in accordance with FAR 52.233-2. The address of the Director of the Contract Group is:

William N. Patterson, Director
Contracting Group, FSC
U.S. Office of Personnel
1900 E Street N.W., Room 1342
Washington, DC 20415

(c) Review and consideration of a protest by the SPE is an alternative to review and consideration by the CO.

1752.237-70 Non-Personal Services (July 2005)

(a) As stated in the Office of Federal Procurement Policy Letter 92-1, dated September 23, 1992, Inherently Governmental Functions, no personal services shall be performed under this contract. No Contractor employee will be directly supervised by the Government. All individual employee assignments, and daily work direction, shall be given by the applicable employee supervisor. If the Contractor believes any Government action or communication has been given that would create a personal services relationship between the Government and any Contractor employee, the Contractor must promptly notify the Contracting Officer of this communication or action.

(b) The Contractor must not perform any inherently Governmental actions under this contract. No Contractor employee shall hold him or herself out to be a Government employee, agent, or representative. No Contractor employee may state orally or in writing at any time that he or she is acting

on behalf of the Government. In all communications with third parties in connection with the contract, Contractor employees must identify themselves as Contractor employees and specify the name of the company for which they work. In all communications with other Government Contractors in connection with this contract, the Contractor employee must state that they have no authority to in any way change the contract and that if the other Contractor believes this communication to be a direction to change their contract, they should notify the Contracting Officer for that contract and not carry out the direction until a clarification has been issued by the Contracting Officer.

(c) The Contractor must insure that all of its employees working on this contract are informed of the substance of this clause. Nothing in this clause limits the Government's rights in any way under any other provision of the contract, including those related to the Government's right to inspect and accept the services to be performed under this contract. The substance of this clause must be included in all subcontracts at any tier.

1752.239-70 Internet Protocol Version 6 (IPV6) (Nov 2012)

In accordance with OPM CIO Directives, this acquisition requires all functionality, capabilities and features to be supported and operational in both a dual-stack IPv4/IPv6 environment and an IPv6 only environment. Furthermore, all management, user interfaces, configuration options, reports and other administrative capabilities that support IPv4 functionality will support comparable IPv6 functionality. Respondents are required to include in their response a letter of self-certification that their product has been tested in both a dual-stack IPv4/IPv6 and IPv6 only environment and meets this requirement. OPM reserves the right to require the respondent's products to be tested within an OPM or 3rd party test facility to show compliance with this requirement.

In accordance with FAR 11.002(g) and OPM CIO Directives, this acquisition must comply with the NIST USGv6 Profile and IPv6 Test Program.

1752.239-73 Section 508 Standards (Feb 2013)

(a) All electronic and information technology (EIT) procured through this RFQ must meet the applicable accessibility standards at 36 CFR 1194, unless an agency exception to this

requirement exists. 36 CFR 1194 implements Section 508 of the Rehabilitation Act of 1973, as amended, and is viewable at <http://www.access-board.gov/sec508/508standards.htm>.

(b) The following standards have been determined to be applicable to this RFQ:

- (1) 1194.21. Software applications and operating systems.
- (2) 1194.22. Web-based intranet and Internet information and applications.
- (3) 1194.23 Telecommunications products.

- (4) 1194.24 Video and multimedia products.
- (5) 1194.25 Self Contained, closed products
- (6) 1194.26 Desktop and portable computers.
- (7) 1194.31 Functional performance criteria.
- (8) 1194.41 Information, documentation, and support

(c) The standards do not require the *installation* of specific accessibility-related software or the attachment of an assistive technology device, but merely require the EIT be compatible with such software and devices so that it can be made accessible if so required by the agency in the future

(d) OPM is required by Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794d), to offer access to electronic and information technology for disabled individuals within its employ, and for disabled members of the public seeking information and services. This access must be comparable to that which is offered to similar individuals who do not have disabilities. Standards for complying with this law are prescribed by the Architectural and Transportation Barriers Compliance Board ("The Access Board").

(e) The current deliverable(s) must incorporate these standards as well as any agency specific standards developed by OPM. The attached technical description contains further information on how this is to be done. Your response to the solicitation should contain documentation of your compliance with these standards. However, the Contracting Officer may request additional technical documentation, if necessary to make this determination.

(f) The final work product must include documentation that the deliverable conforms with the Section 508 Standards promulgated by the US Access Board.

(g) In the event of a dispute between you and OPM, then OPM's assessment of the Section 508 compliance will control and you will need to make any additional changes needed to conform with OPM's assessment, at no additional charge to OPM.

1752.239-75 Minimum Information System Security Requirements (Nov 2012)

(a) Contractor and federal systems must adhere to minimum security requirements following the guidance provided in NIST's FIPS publication 200, *Minimum Security Requirements for Federal Information and Information Systems* and the corresponding security controls described in the current version of NIST Special Publication 800-53, *Recommended Security Controls for Federal Information Systems and Organizations*.

(b) Federal Information Processing Standard (FIPS) publication 199 must be utilized to determine the security categorization (High, Moderate, or Low) for OPM and contractor systems. OPM must determine the categorization for contractor systems. The security categorization, as determined by OPM, must be utilized to identify the security control baseline requirements. The security requirements are the controls baseline, as defined in NIST SP 800-53.

1752.239-76 Security Assessment and Authorization (Nov2012)

(a) All information systems that input, store, process, and/or output OPM information must be authorized to operate by an Authorizing Official (AO) prior to operation either as a stand-alone system or included as a sub-system or component of another system for authorization. Only an Authorizing Official (AO) may authorize an information system to operate. AOs must be government employees. Contractors must adhere to current OPM security Assessment and Authorization (A&A) policies, procedures, and guidance for security A&A activities.

(b) Security authorization documentation must be developed with the use of OPM security documentation templates. Templates are available for all security documentation including; System Security Plan, FIPS 199 Security Categorization, Security Assessment Report, and Contingency Plan. The OPM authorization checklist must be followed throughout the security authorization process to ensure proper oversight from OPM Information Technology Security and Privacy (ITSP) program.

(c) Prior to Security Assessment and Authorization, a Privacy Threshold Analysis (PTA) for all systems must be completed and provided to the OPM Privacy Officer for a determination. If determination is made that a Privacy Impact Assessment (PIA) is required, it must be completed in accordance with the *OPM Privacy Impact Assessment Guide*.

1752.239-77 Privacy Act Compliance (Nov 2012)

(a) Contractors must comply with the Privacy Act of 1974 rules and regulations in the design, development, or operation of any system of records on individuals to accomplish an OPM function for a System of Records (SOR)¹.

(b) In the event of violations of the Act, a civil action may be brought against OPM involved when the violation concerns the design, development, or operation of a SOR on individuals to accomplish an OPM function, and criminal penalties may be imposed upon the officers or employees of OPM when the violation concerns the operation of a SOR on individuals to accomplish an OPM function. For purposes of the Act, when the contract is for the operation of a SOR on individuals to accomplish an OPM function, the contractor/subcontractor is considered to be an employee of the agency.

1752.239-78 Cloud Computing (Nov2012)

(a) Contractors handling OPM information or operating information systems on behalf of OPM must protect OPM information and information systems against unauthorized access, use, disclosure, disruption, modification, or destruction per the Federal Information Security Management Act (FISMA) and OPM Security and Privacy policy.

(b) OPM information stored in a cloud environment remains the property of OPM, not the contractor or cloud service provider. OPM retains ownership of the information. The cloud provider does not have rights to the OPM information for any purposes other than those explicitly stated in the contract.

(c) The cloud provider must protect OPM information from unauthorized access by cloud provider personnel, contractors, or other cloud service subscribers.

¹ “System of Records” is defined as a group of any records under the control of any agency from which information is retrieved by the name of the individual or by some identifying number, symbol, or other identifying particular assigned to the individual.

(d) The cloud provider must allow OPM access to OPM information including data schemas, meta data, and other associated data artifacts that are required to ensure OPM can fully and appropriately retrieve OPM information from the cloud environment that can be stored, read, and processed.

1752.239-86 Contractor System Oversight/Compliance (Nov 2012)

(a) All contractor systems, service providers and third-party vendors must complete the IT OPM Offsite System Security Self-Assessment Survey and submit the assessments to their Contracting Officer and the CIO IT Security and Privacy Office for review and evaluation. This is a supplemental requirement and does not replace contract requirements under FISMA. The federal government has the authority to conduct site reviews for compliance validation. Full cooperation by contractor and third-party providers is required for audits and forensics.

(b) The Contractor shall support the OPM in its efforts to assess and monitor the contractor systems and infrastructure. The contractor shall provide logical and physical access to the contractor's facilities, installations, technical capabilities, operations, documentation, records, and databases upon request. The contractor will be expected to perform automated scans and continuous monitoring activities which may include, but not limited to, authenticated and unauthenticated scans of networks, operating systems, applications, and databases and provide the results of the scans to OPM or allow OPM personnel to run the scans directly.

1752.239-87 Additional Security Requirements (Apr 2012)

(a) As prescribed in the FAR clause 24.104:

- If the system involves the design, development, or operation of a system of records on individuals, the contractor shall implement requirements in FAR clause 52.224-1, "Privacy Act Notification" and FAR clause 52.224-2, "Privacy Act"²

(b) Information technology acquisitions shall use OPM established configuration settings, or utilize common security configurations available from the National Institute of Standards and Technology's website at <http://checklists.nist.gov> where OPM standards do not exist. (FAR part 39).

1752.242-70 Contract Performance Information (July 2005)

(a) Dissemination of Contract Performance Information

The Contractor must not publish, permit to be published, or distribute for public consumption, any information, oral or written, concerning the results or conclusions made pursuant to the performance of this contract, without the prior written consent of the Contracting Officer. Two copies of any material proposed to be published or distributed must be submitted to the Contracting Officer for approval.

(b) Contractor Testimony

All requests for the testimony of the Contractor or its employees, and any intention to testify as an expert witness relating to: (a) any work required by, and or performed under, this contract: or (b) any

² Access to the Federal Acquisition Regulation (FAR) can be obtained on the web at http://farsite.hill.af.mil/farsite_alt.html, or by contacting the Contracting Officer/Contract Specialist.

information provided by any party to assist the Contractor in the performance of this contract, must be immediately reported to the Contracting Officer. Neither the Contractor nor its employees must testify on a matter related to work performed or information provided under this contract, either voluntarily or pursuant to a request, in any judicial or administrative proceeding unless approved by the Contracting Officer or required by a judge in a final court order.

ORDER FOR SUPPLIES OR SERVICES

PAGE OF PAGES

1

2

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

1. DATE OF ORDER 12/16/2014		2. CONTRACT NO. (If any) GS23F0037T		6. SHIP TO: a. NAME OF CONSIGNEE INVESTIGATION SERVICES	
3. ORDER NO. OPM1515F0163		4. REQUISITION/REFERENCE NO. 48539		b. STREET ADDRESS 04AD	
5. ISSUING OFFICE (Address correspondence to) BOYERS REGION FISC CONTRACTING US OFFICE OF PERSONNEL MANAGEMENT 1137 BRANCHTON ROAD BOYERS PA 16018				c. CITY d. STATE e. ZIP CODE	
7. TO: a. NAME OF CONTRACTOR IDENTITY THEFT GUARD SOLUTIONS LLC b. COMPANY NAME c. STREET ADDRESS 401 SW 5TH AVE				f. SHIP VIA 8. TYPE OF ORDER <input type="checkbox"/> a. PURCHASE <input checked="" type="checkbox"/> b. DELIVERY REFERENCE YOUR: Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated. Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.	
d. CITY PORTLAND		e. STATE OR		f. ZIP CODE 97204	
9. ACCOUNTING AND APPROPRIATION DATA 2087700				10. REQUISITIONING OFFICE OPM	

11. BUSINESS CLASSIFICATION (Check appropriate box(es)) <input checked="" type="checkbox"/> a. SMALL <input type="checkbox"/> b. OTHER THAN SMALL <input type="checkbox"/> c. DISADVANTAGED <input type="checkbox"/> d. WOMEN-OWNED <input type="checkbox"/> e. HUBZone <input type="checkbox"/> f. SERVICE-DISABLED <input type="checkbox"/> g. WOMEN-OWNED SMALL BUSINESS (WOSB) <input type="checkbox"/> h. ECONOMICALLY DISADVANTAGED WOMEN-OWNED SMALL BUSINESS (EDWOSB)				12. F.O.B. POINT Destination	
13. PLACE OF a. INSPECTION Destination		b. ACCEPTANCE Destination		14. GOVERNMENT B/L NO.	
				15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date) 07/01/2015	
16. DISCOUNT TERMS					

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	This order is for data breach services against the contractor's GSA schedule 520-19 contract and incorporates OPM's RFQ for these services dated 12/11/2014 as amended on 12/13/2014, and the contractors quotation dated 12/12/2014 as revised Continued ...					

18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		17(h) TOTAL (Cont. pages)	
21. MAIL INVOICE TO: a. NAME OFFICE OF THE CHIEF FINANCIAL OFFIC b. STREET ADDRESS (or P.O. Box) OFFICE OF THE CHIEF FINANCIAL OFFIC 1900 E ST NW RM 5475 c. CITY WASHINGTON d. STATE DC e. ZIP CODE 20416							
22. UNITED STATES OF AMERICA BY (Signature)						\$962,035.00	17(i) GRAND TOTAL
23. NAME (Typed) James C. Thieme TITLE: CONTRACTING/ORDERING OFFICER						\$962,035.00	

ORDER FOR SUPPLIES OR SERVICES

PAGE NO

SCHEDULE - CONTINUATION

2

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

ITEM NO. (a)	SUPPLIES/SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	12/13/2014. Admin Office: BOYERS REGION FISC CONTRACTING US OFFICE OF PERSONNEL MANAGEMENT 1137 BRANCHTON ROAD BOYERS PA 16018 Period of Performance: 12/15/2014 to 07/01/2015					
00001	Notification Services					
00002	Call Center Support					
00003	Credit Monitoring					
	The total amount of award: \$962,035.00. The obligation for this award is shown in box 17(i).					

(b) (4)

(b) (4)

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17(H))



Registration Form for Federal Publications Seminars

Attendee/Title	Course/Date	E-Mail Address	Telephone Number	Billing Address
Ernesto Martinez Director, IAD	CyberContracting Management November 2-6, 2015	ernesto.martinez@gsa.gov	(b) (6)	GSA, Office of Administrative Services Internal Acquisition Division Attn: Bridgette Overbey 1800 F St NW Mail Code (H1E) Washington, DC 20405
Lisa Ellis Branch Chief	CyberContracting Management November 2-6, 2015	lisa.ellis@gsa.gov		Same as above
Nina Malakouti Branch Chief	CyberContracting Management November 2-6, 2015	nina.malakouti@gsa.gov		Same as above
Christopher T. Smith Contract Specialist	CyberContracting Management November 2-6, 2015	christophert.smith@gsa.gov		Same as above
Carmen Parker Contract Specialist	CyberContracting Management November 2-6, 2015	carmen.parker@gsa.gov		Same as above
Jane Facchina Contract Specialist	CyberContracting Management November 2-6, 2015	jane.facchina@gsa.gov		Same as above
Mary Kate Markano Contract Specialist	CyberContracting Management November 2-6, 2015	marykate.markano@gsa.gov		Same as above
Michael Lennon Contract Specialist	CyberContracting Management November 2-6, 2015	michael.lennon@gsa.gov		Same as above



Individual Development Plan
(IDP) Application: SF 182
Employee User Guide

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1. Overview

The Standard Form (SF) 182 is the Authorization, Agreement, and Certification form. The form has been integrated into the Individual Development Plan (IDP) application in Salesforce to streamline the process of completing SF 182 requests. When an employee's IDP is approved for the current or next fiscal year and contains at least one activity that includes a cost, he or she will submit an SF 182. An SF 182 is created only after the IDP has been approved by the employee's supervisor.

1.1 Roles and Responsibilities

There are four main roles related to an SF 182 request: Requester (or employee who owns the record), Supervisor, Approver, and Purchasing Training Coordinator (PTC). Below is a description of each role:

Role	Description
Requester	The Requester, or employee submitting the request, is the owner of the SF 182. The Requester is responsible for creating his or her SF 182 requests, submitting them for approval, and revising them, should revisions be needed. All users of this application can create and edit their own SF 182s.
Supervisor	The Supervisor is responsible for approving or suggesting modifications to his or her Requesters' SF 182 requests. When approving an SF 182 request, the Supervisor is also responsible for sending it to the next Approver in the approval chain. If there is no additional Approver, the Supervisor becomes the Final Approver and is responsible for assigning the request to the Purchasing Training Coordinator (PTC) after he or she approves it.
Approver	Approvers are additional users responsible for approving or requesting modifications to an SF 182 request after the Supervisor or previous Approver(s) approve it. There can be up to four additional Approvers. The amount of Approvers varies by office and region. An Approver will only see the content of the request once it is his or her turn to review it. The last person in the approval chain is the Final Approver and is responsible for assigning the SF 182 request to the Purchasing Training Coordinator (PTC).
Purchasing Training Coordinator	The Purchasing Training Coordinator (PTC) gains access to the SF 182 request after final approval is received. The PTC is responsible for contacting the relevant vendor(s) and adding billing and cost information to the SF 182 record.

SF 182 records in the application are not accessible to all users of the application. Instead, access to each SF 182 request is limited to the Requester, Supervisor and Approver(s) assigned to the record, as well as the PTC and colleagues with whom the Requester has manually shared the record. HR personnel and specified Regional and Service and Staff Office (S/SO) points of contact also have access to SF 182 records in the application for reporting purposes.

1.2 Lifecycle of an SF 182 Request in the Application

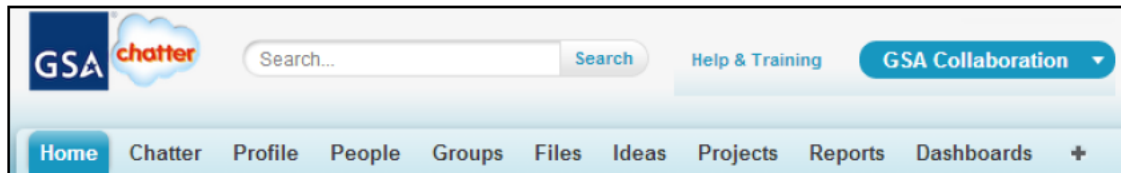
An SF 182 request moves through several stages. Below is a description of each step in the lifecycle of the form:

Step	Description	Request Status
1	The Requester creates an SF 182 in the IDP application after his or her IDP is approved. The SF 182 consists of two sections. The first section contains general information about the Requester and identifies the IDP associated with the form. The second section contains information specific to each individual request related to the SF 182. Each activity in the approved IDP that has a cost associated with it will have its own individual request in the SF 182.	Initiating
2	The Requester submits each individual request in the SF 182 to his or her Supervisor to begin the approval process. Each request contained in the SF 182 is submitted for approval, reviewed, approved, and rejected individually. For example, if the SF 182 contains three separate requests, the Requester would submit three requests from the same SF 182 to the approval chain.	Approval Process In Progress
3	Each request in the SF 182 moves through the approval process. The approval process always begins with the Supervisor and can include up to four additional Approvers. The approval chain happens in a specific order, rather than each person reviewing the request at the same time. In order for the request to move to the next person in the approval chain, the previous reviewer must first approve it. Anyone in the approval chain may also reject the request when it is that person's turn to review (see Steps 4.1 and 4.2 for more information). It is possible that a request in the same SF 182 may be approved while another request in the SF 182 is rejected.	Approval Process In Progress
4.1	If anyone in the approval chain rejects the SF 182 request, it is sent back to the Requester to revise. Once the Requester makes revisions, he or she resubmits the request and starts the approval chain over again, beginning with the Supervisor.	Rejected
4.2	Once the SF 182 request has been approved by everyone on the approval chain, including the Final Approver, it is considered final and is sent to the PTC. The PTC is not part of the approval chain.	Approved
Optional	During the approval process, the Requester cannot edit the SF 182 request. If the Requester would like to make changes during the approval process, he or she can recall the request. Once revised, the Requester needs to start the approval process over again, beginning with the Supervisor.	Correction
Optional	It is possible the Requester may need his or her Supervisor to cancel a request in the SF 182. When a request is cancelled, the approval process is cancelled as well.	Cancellation Obligated, Cancellation Not Obligated

2. Accessing the SF 182 Tab

The SF 182 creation and approval process is built into the IDP application in Salesforce. To access the SF 182 section of the application:

Step 1: Log into Salesforce via **connect.gsa.gov**. When you login, you will see a toolbar at the top of your screen similar to the one below:



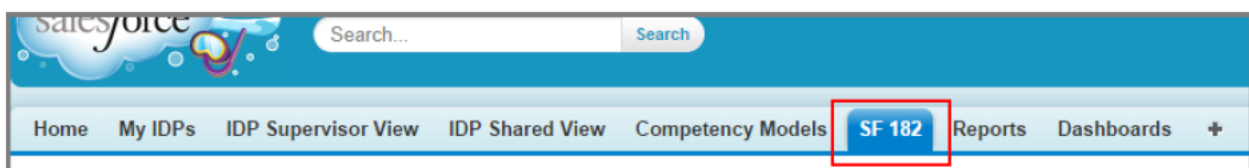
Note: The tabs you see in the toolbar may vary from the tabs in the above screenshot. The tabs you see will be specific to the applications you use.

Step 2: Click the **Force.com App Menu** button in the top right of the screen and select **IDP** from the drop down menu.



Note: The applications you see in the **Force.com App Menu** drop down list may vary from the applications in the above screenshot. The list you see will be specific to the applications you use or to which you have access.

Step 3: Click the tab labeled **SF 182**.



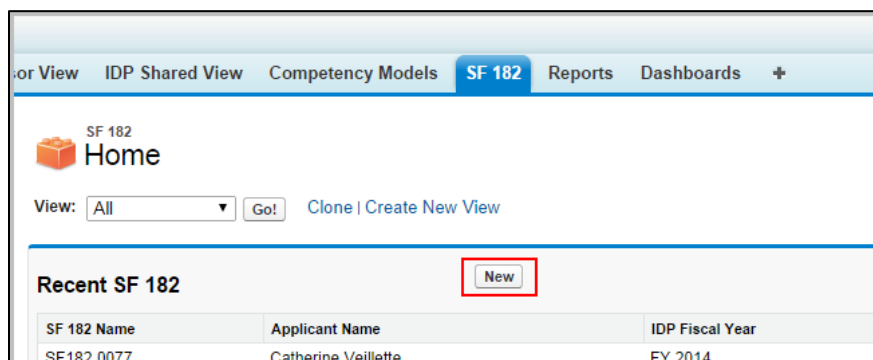
3. Creating and Submitting an SF 182 Request

SF 182 records consist of two sections. The first section contains general information about the Requester and identifies the IDP associated with the form. The second section contains information specific to each individual request related to the SF 182. Each activity in the approved IDP that has a cost associated with it will have its own individual request in the SF 182. For example, if your approved IDP has three activities with costs associated with them, you would complete one SF 182 related to the IDP that contains three individual requests.

To get started, first create the SF 182 record associated with your approved IDP. Then add the individual requests to the record based on the activities in your IDP with associated costs.

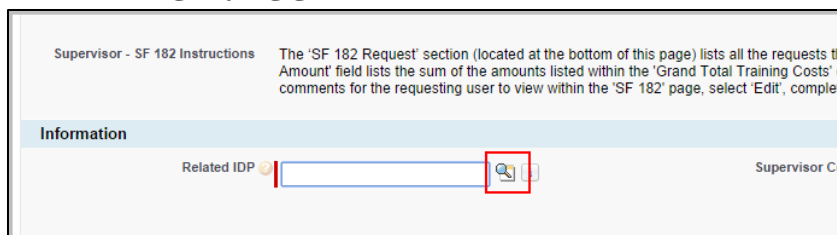
Part One: Create an SF 182 Record

Step 1: Select the **SF 182 tab** and click the **New button**.



Step 2: Select the approved IDP with which the SF 182 is associated. To do so:

- Click the **magnifying glass icon** next to the field labeled *Related IDP*.



- In the box that opens, you'll see a list containing your approved IDPs. If you do not see the IDP in the list, enter the IDP name in the *Search field* and click the **Go! button**.

Then click the name of the applicable approved IDP in the list.

The screenshot shows a Salesforce Lookup page. At the top, there is a search bar with the text "Search..." and a "Go!" button. Below the search bar, there is a table titled "Recently Viewed Shared IDPs". The table has four columns: "IDP Record Number", "Employee Name", "Fiscal Year", and "IDP Status". The table contains three rows of data:

IDP Record Number	Employee Name	Fiscal Year	IDP Status
IDP-0009755	Megha Taneja	FY 2015	Approved
IDP-0009178	Megha Taneja	FY 2014	Approved
IDP-0009151	Megha Taneja	FY 2014	Approved

Below the table, there is a copyright notice: "Copyright © 2000-2014 salesforce.com, inc. All rights reserved."

Step 3: Complete the fields in the *Trainee Information* section of the form. You're required to select your age range and position levels from the drop down menus next to each field. You can also enter your completed education level and provide information on any special accommodations you may need.

The screenshot shows the "Trainee Information" section of a form. It contains the following fields:

- Age Range: A dropdown menu with "--None--" selected.
- Education Level: A dropdown menu with "--None--" selected.
- Position Level: A dropdown menu with "--None--" selected.
- Does Applicant need Special Accommodation: A dropdown menu with "--None--" selected.
- If Yes, please describe accommodation: A text input field.

Step 4: Click the **Save** button.

You've now completed the first section of the SF 182. Now you can begin creating the individual request(s) associated with the SF 182 record you just created.

Part Two: Add Requests to the SF 182 Record

Step 1: Scroll to the bottom of the SF 182 record to the section labeled *SF 182 Request* and click the **New SF 182 Request** button.

Series 0132 - Intelligence Series
Grade 15
Pay Plan WS - Wage Supervisor
Created By Megha Taneja, 9/24/2014 1:31 PM
Owner Megha Taneja [Change]
Last Modified By Megha Taneja, 9/24/2014 1:31 PM
Edit Sharing
SF 182 Request New SF 182 Request
No records to display
[Back To Top](#) Always show me [more records per related list](#)

Step 2: (optional) In the section labeled *Approvals/Concurrence*, select the Approvers in your approval chain. Your Supervisor will be automatically populated when you save the request so you do not need to complete that field. You can add up to four additional Approvers. The number of additional Approvers will vary by region, office, and individual circumstances. Your Supervisor and any added Approvers can also add Approvers when they review the request after you've submitted it for approval. Add Approvers in chronological order. For example, add the person responsible for reviewing the request after your Supervisor to the *Approver 1* field. Add the person responsible for reviewing the request after Approver 1 to the *Approver 2* field. To add Approvers:

- Click the **magnifying glass icon** next to the *Approver field* for the Approver you are adding.
- In the box that opens, enter the Approver's name in the *Search field* and click the **Go!** button. Click on the person's name in the search results list.

Lookup
 Go!
 You can use "*" as a wildcard next to other characters to improve your search
[Clear Search Results](#)
Search Results

Full Name	Title	Division
Christopher Buchanan	Salesforce PM/BA	ID



 Supervisory Mechanical Engineering

Approvals/Concurrence
 Supervisor User
 Approver 1 User Christopher Buchanan
 Approver 2 User
 Approver 3 User
 Approver 4 User
 Purchasing Training Coordinator User

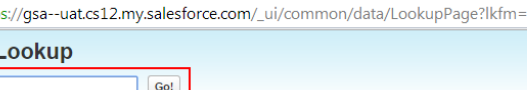
- Repeat for each additional Approver you'd like to add.

Step 3: In the *Activity Information* section, select the activity from your approved IDP to which the request applies. To do so:

- Click the **magnifying glass icon** next to the *Activity field*.


Activity Information (to be completed by the requesting user)	
Requester Instructions - Activity Info	Please select the 'Activity' in which you are creating the request for. Please note that you can only select one Activity (i.e. the IDP you selected within the 'SF 182' page). Once you select an Activity, the selected Activity will automatically be added to your request form as a reference.
<div> Activity  <input type="text"/>  </div>	

- In the box that opens, type **DA*** into the *Search field* and click the **Go! button**. All activities associated with your approved IDPs will appear. Locate the activity that applies to the SF 182 request and click the hyperlink in the search results list. The activity will now appear in the *Activity field* of the request.



The screenshot shows a web browser window with the address bar displaying the URL: https://gsa-uat.cs12.my.salesforce.com/_ui/common/data/LookupPage?lkfml=editPage&.... The page title is "Lookup". Below the title is a search bar containing the text "DA*" and a "Go!" button. A red box highlights the search bar and the "Go!" button. Below the search bar, a message states: "You can use '*' as a wildcard next to other characters to improve your search results." Below this message is a table of results. The first two rows of the table have their first column values, "IDP-0009688 DA-020799" and "IDP-0009688 DA-020800", highlighted with red boxes. A red arrow points from the "Go!" button to the first row of the table. The table has six columns: ID, Name, Object, Activity, Date 1, and Date 2.

ID	Name	Object	Activity	Date 1	Date 2
IDP-0009688	DA-020799	OBJ-0017014	TEST 1	9/19/2015	9/19/2015
IDP-0009688	DA-020800	OBJ-0017014	TEST 2	9/19/2015	9/19/2015
IDP-0009755	DA-020857	OBJ-0017074	2 Activity		
IDP-0009755	DA-020858	OBJ-0017073	1 Activity		


Activity Information (to be completed by the requesting user)	
Requester Instructions - Activity Info	Please select the 'Activity' in which you are creating the request for Activities (i.e. the IDP you selected within the 'SF 182' page). Once selected Activity will automatically be added to your request form a
Activity	<input type="text" value="DA-020857"/> 


Step 4: In the *Vendor Information* section, add the name of the vendor you will be using for the request and a point of contact at the vendor. For example, if you will be attending training, add the name of the vendor who will be providing the training and GSA’s point of contact at the vendor. This will help the Purchasing Training Coordinator (PTC) when the request reaches final approval and the PTC needs to contact vendors. To do so:

- Click the **magnifying glass icon** next to the field labeled *Training Vendor Name* to add a vendor or *Vendor Contact* to add a point of contact.

Vendor Information (to be completed by the requesting user)

Requester Instructions - Vendor Info: Please select the name of the vendor that will be providing the training as well as the name of the PoC associated with the training vendor; if the vendor or contact is not listed please add them using the 'Contacts Manager' application or send an email to IDPTeam@gsa.gov with the name and details of the vendor and contact

Training Vendor Name 

(Optional) Vendor Contact 


- To search for a vendor in the box that opens, type the first two or three letters of the vendor's name in the *Search field*. This helps ensure your search picks up the right vendor. Sometimes the name of a vendor in the system may vary slightly from how you would type it. For instance, the word "Association" may be abbreviated in the system even though the vendor spells it out on its website. Typing part of the vendor name ensures all vendors that match what you type will show up in the results list. To search for a contact, type the person's name in the *Search field*.
- Click the **Go! button**. A list of search results will appear.
- Click the vendor or contact name from the list. The vendor or contact you selected will now appear in the applicable field in the *Vendor Information section* of the request.

Lookup

Search ☒ Name ☐ All Fields

[< Clear Search Results](#)

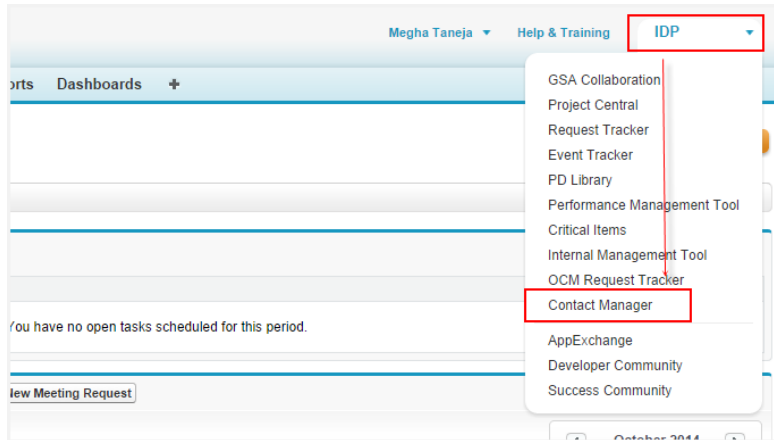
Search Results

 **Accounts [6]** [Show Filters](#) [My Columns](#)

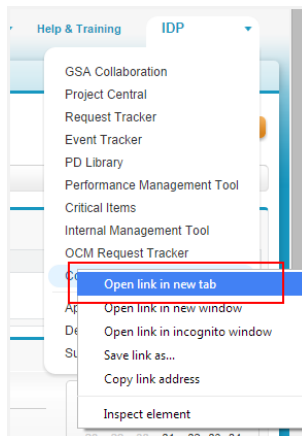
Account Name	Account Site	Phone	Account Owner Alias
Annie Test		(555) 555-5555	cade
Testing 1 Account			mtane354
Friday Test		(555) 555-5555	cade
Test CAB Account		800-LUV-FOIA	cbuch

After you complete the *Training Vendor Name* and *Vendor Contact fields*, proceed to **Step 5**. There may be cases where the vendor and/or contact will not be saved in the system when you search while completing these fields. If that is the case, you will need to add the vendor and/or contact to Salesforce using the Contact Manager application. This application is separate from the IDP application you're using to create your SF 182 request. To access the Contact Manager:

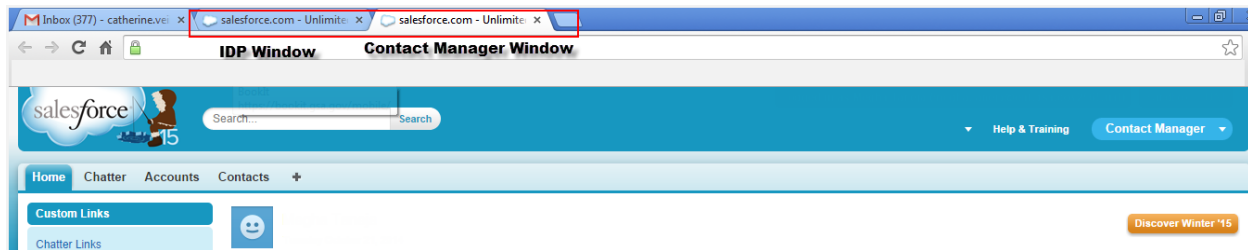
- Click the **Force.com** button in the top right corner of the screen and locate **Contact Manager** from the list.



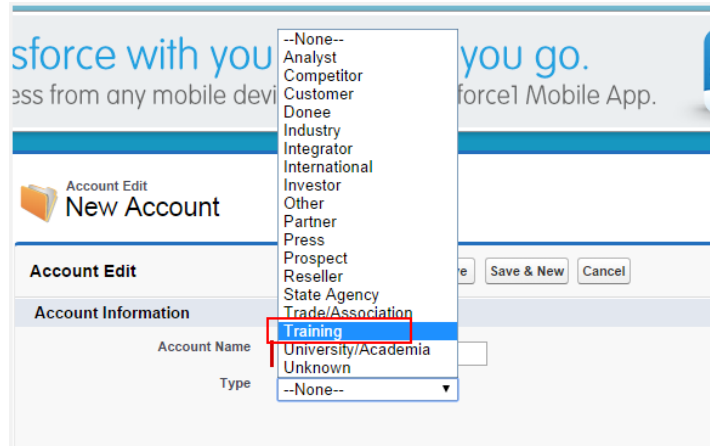
- Right click on **Contact Manager** and select *Open link in new tab* from the drop down menu.



- The Contact Manager will now open in a new tab in your web browser. For instructions on how to use the Contact Manager application, see the [Contact Manager User Guide](#). This application is used to add accounts and contacts to Salesforce and is not specifically designed for only SF 182 requests in the IDP application. Below are tips and tricks for adding vendors and/ or contacts in the Contact Manager specifically for an SF 182 request:
 - If you followed the above instructions to access the Contact Manager, you will be able to switch back and forth between the IDP application and Contact Manager application simply by clicking on the applicable tab at the top of the screen, as illustrated in the below screenshot.



- When adding a vendor to Contact Manager to add to an SF 182 request, select **Training** from the drop down menu of the *Type* field.



- Your IDP window will time out after 30 minutes of inactivity in that application. If the window times out, you will lose the information in the SF 182 request you were creating. As a best practice, once you've saved a vendor or contact in the Contact Manager, switch back to the IDP application immediately by clicking on the IDP tab at the top of the screen and add the vendor or contact to your SF 182 request by following the instructions outlined in **Step 4**. This will help avoid hitting the 30 minute limit that will cause you to lose your work.

Step 5: Complete the fields in the *Training Course Data* section. Required fields are marked with a red line.

Hints:

- On the date you enter in the *Training End Date* field, you will receive an email notification asking you to update the request to mark the training as complete. You will receive reminders five and ten days later if you do not mark the request as complete. For more information, see [Marking a Request as Completed](#).
- If the combined number of hours entered in the *Training Duty Hours* and the *Training Non Duty Hours* fields exceeds 80 hours, you'll need to accept the *GSA Continuing Service Agreement* upon saving the record.
- If you select **Off-site** from the *Location* drop down menu, the *If Off-site, list City* and *If Off-site, list State* fields also become required.

Training Course Data (to be completed by the requesting user)

Requester Instructions - Training Course Please add information specific to your training course by completing the 'Training Course Data' section. IMPORTANT: You will be required to agree to the GSA Continuing Service Agreement if the sum of your 'Training Duty Hours' + 'Training Non Duty Hours' meets or exceeds 80 hours. Upon saving your request you will be required to select the 'GSA Continuing Service Agreement' button before you can submit your request for approval.

Course Title if Diff. from Activity Name	Training Start Date [10/3/2014]
Course Number	Training End Date [10/3/2014]
Training Credit	Training Duty Hours
Is Vendor Accredited? --None--	Training Non Duty Hours
Training Type Code --None--	Location --None--
Training Sub Type Code --None--	If Off-site, list City
Training Purpose Type --None--	If Off-site, list State --None--
Training Credit Type Code --None--	
Training Designation Type Code --None--	
Training Source Type Code --None--	
Training Delivery Type Code --None--	

Costs and Billing Information (to be completed by the requesting user)

Step 6: Complete the fields in the *Costs and Billing Information* section. Required fields are marked with a red line.

Hint:

- If the total amount of the costs you enter exceed \$3,000, you will be asked to accept the *GSA Continuing Service Agreement* upon saving the record.

Costs and Billing Information (to be completed by the requesting user)

Requester Instructions - Costs & Billing Please add the information specific to the costs of your activity / training and enter any sp 'Billing Instructions' field. IMPORTANT: You will be required to agree to the GSA Continui exceeds 3K. Upon saving your request you will be required to select the 'GSA Continuing approval.

Billing Instructions	
Tuition and Fee	
Books and Materials	
Travel Cost	
Per Diem	

Step 7: Click the **Save** button.

Step 8: (if applicable) If the total number of duty and non-duty training hours you entered exceed 80 hours and/or the total costs entered in the *Costs and Billing Information* section exceed \$3,000, accept the *GSA Continuing Service Agreement*. To do so:

- Click the **GSA Continuing Service Agreement** button at the top or bottom of the request. The *GSA Continuing Service Agreement* terms and conditions will open.

- Read the terms and conditions in the box that opens.
- Click the **I Accept** button.

- In the box that opens, click **OK**. In the request, you'll now see the *Terms and Conditions* – *Accepted* field checked and the date you accepted the terms in the field labeled

Continued Srvc Agreement Accepted Date.

pending an approval review and must be received by the soon. Each user should select the 'Training Completed' button once they have completed training.

About the GSA Continuing Service Agreement

The 'Terms and Conditions - Accepted' and 'Continued Srvc Agreement Accepted Date' fields are automatically populated when a user selects the 'GSA Continuing Service Agreement' button and agrees to the terms and conditions (please note, this button will not appear until you have saved your request). The 'Continued Srvc Agreement Accepted Date' field is automatically populated when the request's costs meet or exceed 3000 hours meet or exceed 80 hours (includes training duty hours and training non duty hours).

SF 182 Training Name	SF-Training-000190	Request Status	Initiating
SF 182	SF182_0078	Cancel Training	<input type="checkbox"/>
Terms and Conditions - Accepted	<input checked="" type="checkbox"/>	Was Money Obligated?	<input type="checkbox"/>
Continued Srvc Agreement Accepted Date	9/26/2014	Is the Money Refundable?	<input type="checkbox"/>
Deadline for requesting a refund?			

▼ Approvals/Concurrence (reference section for requester)

Your request is now saved to the SF 182 record. You can make revisions to the record and also submit it for approval. Repeat these steps for each additional request you'd like to add to the SF 182.

3.1 Submitting a Saved SF 182 Request

To submit a saved SF 182 request:

Step 1: Open the request. To do so, scroll to the bottom of the SF 182 record to the section labeled *SF 182 Request*. You'll see a list of requests associated with that SF 182. Click the hyperlink of the request you'd like to submit in the column labeled *SF 182 Training Name*.

Edit Sharing

SF 182 Request New SF 182 Request SF 182 Request He

Action	SF 182 Training Name	Total (TF and BM)	Cumulative Amount	Grand Total Training Costs	Activity Name	Supervisor	Purchasing Training Coordinator
Edit	SF-Training-000190	3,000.00	3,000.00	3,000.00	Testing Activity	Catherine Veillette	

Back To Top Always show me more records per related list

Step 2: Scroll to the bottom of the request to the section labeled *Approval History* and click the **Submit for Approval** button.

▼ Submit for Approval Disclaimer

If the Total Hours of your request meets or exceeds 80 hours -AND/OR- if the costs of your training (i.e. Grand Total Training Costs) exceeds 3000.00 then you must select the GSA Continuing Service Agreement button and agree to the terms and conditions then you will not be allowed to submit your request for approval.

Edit GSA Continuing Service Agreement Reset Approval Process

Approval History Submit for Approval

No records to display

Back To Top Always show me more records per related list

Your request is now awaiting your Supervisor's approval. Your Supervisor will receive an email notification with a link to the request letting him or her know there is a request to review. Your Supervisor will either approve it or request modifications to it. You will receive an email when the request reaches its final approval or if any Approver in the approval chain requests modifications to it.

3.2 Resuming a Paused Approval Process

If your Supervisor or another Approver approves your SF 182 request before the next person in the approval chain has been added to the request, the approval process will be paused and will need to be resumed. This does not apply to the Final Approver in the approval process. The Supervisor or Approver who forgot to add the next person in the approval chain will kick start the process and you as the Requester will come in at the end.

Step 1: (To be taken by the *Supervisor* or *Approver* who did not add the next person in the approval chain) The Supervisor or Approver will receive an email notification once he or she approves the request without adding the next Approver to the record. The recipient will add the next Approver to the request and check the box in the request labeled *Resume Approval Process*. You as the Requester will then receive an email notification telling you to resubmit the request.

Step 2: Open the request. There are two ways to do this:

- Open the email notification and click the link to the SF 182 request at the bottom of the email. The request will open. Or,
- Open the request in the SF182 tab. For instructions, see [Opening an SF 182 Request Through the SF 182 Tab](#).

Step 3: Scroll to the bottom of the request to the section labeled *Approval History* and click the **Submit for Approval** button.

The screenshot shows a web interface for an SF 182 request. At the top, there is a section titled 'Submit for Approval Disclaimer' with a red warning message: 'If the Total Hours of your request meets or exceeds 80 hours -AND/OR- if the costs of your training (i.e. Grand Total Training) exceeds 3000.00 then you must select the GSA Continuing Service Agreement button and agree to the terms and conditions then you will not be allowed to submit your request for approval.' Below this, there are three buttons: 'Edit', 'GSA Continuing Service Agreement', and 'Reset Approval Process'. The 'GSA Continuing Service Agreement' button is highlighted with a red box. Below the buttons is a section titled 'Approval History' with a table. The table has columns: Action, Date, Status, Assigned To, Actual Approver, and Comments. The first row in the table is 'Step: Step 2'. The 'Submit for Approval' button is highlighted with a red box.

The approval process will now resume. The new Approver who was added to the request will receive an email notification asking him or her to review the request. The approval process will not start over again from the beginning.

3.3 Resetting an Approval Chain

You may find yourself in a situation where the approval chain for a request has changed. You can change the names in an approval chain by resetting the approval process. You're only able to reset an approval chain if the request has been rejected or if you recall a request after it has been submitted.

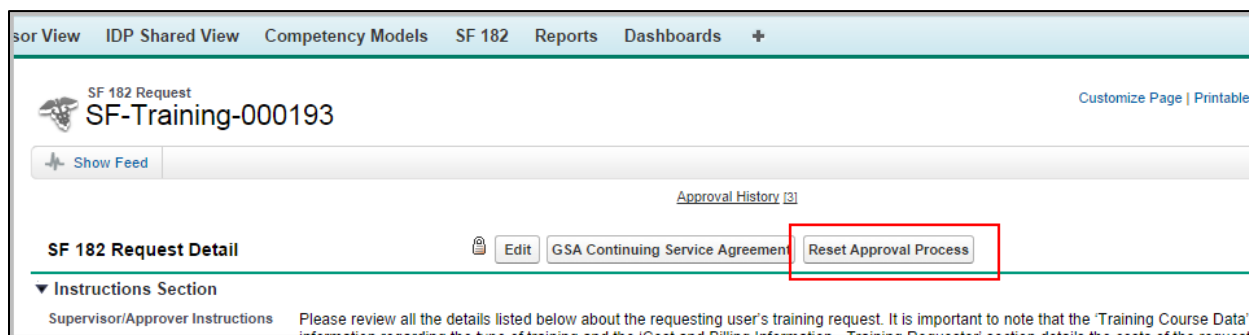
To reset an approval process:

Step 1: (if applicable) Recall the request. For instructions, see [Recalling Your Submitted SF 182 Request](#). If the request has been rejected, skip this step and proceed to Step 2.

Step 2: Open the SF 182 request. There are two quick ways to do this:

- Open the request in the SF182 tab. For instructions, see [Opening an SF 182 Request Through the SF 182 Tab](#). Or,
- If your request was rejected, open the email notification stating your request has been rejected and click the link to the SF 182 request at the bottom of the email. The request will open. You will not receive an email notification if your request was recalled.

Step 3: Click the **Reset Approval Process** button.



Step 4: In the box that opens, click **OK**. Any Approvers in the request will now be removed. Your Supervisor will stay in the request.

Step 5: Click the **Edit** button.

Step 6: In the section labeled *Approvals/Concurrence*, select the Approvers in your approval chain. You can add up to four additional Approvers. The number of additional Approvers will vary by region, office, and individual circumstances. Your Supervisor and any added Approvers can also add Approvers when they review the request after you've submitted it for approval. Add Approvers in chronological order. For example, add the person responsible for reviewing the request after your Supervisor to the *Approver 1 field*. Add the person responsible for reviewing the request after Approver 1 to the *Approver 2 field*. To add Approvers:

- Click the **magnifying glass icon** next to the *Approver field* for the Approver you are adding.
- In the box that opens, enter the Approver's name in the *Search field* and click the **Go! button**. Click on the person's name in the search results list.

Lookup

Search for:

You can use ***** as a wildcard next to other characters to improve your search.

< [Clear Search Results](#)

Search Results

Full Name	Title	Division
Christopher Buchanan	Salesforce PM/BA	ID
Supervisory Mechanical Engineering		

Approvals/Concurrence

Supervisor Catherine Veillette

Approver 1 **Christopher Buchanan**

Approver 2

Approver 3

Approver 4

Purchasing Training Coordinator

Approver 1: I am the Final Approver

Approver 2: Resume Approval

Approver 3: Recall

- Repeat for each additional Approver you'd like to add.

Step 7: Click the **Save** button.

Step 8: Submit the request to the new approval chain. For instructions, see [Submitting a Saved SF 182 Request](#).

4. Revising SF 182 Requests

You can revise requests that have not been submitted for approval, requests that have been recalled, and requests that have been rejected by your Supervisor or an Approver. You can also mark a request as complete once you've completed the activity associated with it, after the request reaches its final approval and the Purchasing Training Coordinator (PTC) has added costs and billing information to it.

4.1 Recalling Your Submitted SF 182 Request

When an SF 182 request has been submitted for approval you are not able to edit it. To make changes to the request, you would need to recall it.

To do so:

Step 1: Open the request in the SF182 tab. For instructions, see [Opening an SF 182 Request Through the SF 182 Tab](#).

Step 2: Scroll to the bottom of the request to the section labeled *Approval History* and click the **Recall Approval Request** button.

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 2 (Pending for first approval)	9/29/2014 11:02 AM	Pending	Steve Springer	Steve Springer		Pending
Step: Step 1	9/29/2014 11:02 AM	Approved	Catherine Veillette	Catherine Veillette		Approved

Step 3: On the next screen, click the **Recall Approval Request** button.

The request will now have a Request Status of *Correction* and you will be able to make revisions to it. Once resubmitted, the approval process will start over again, beginning with the Supervisor.

4.2 Editing a New, Recalled, or Rejected SF 182 Request

You can revise an SF 182 request that has not been submitted for approval, has been recalled, or has been rejected. SF 182 requests that have not been submitted will have an *Initiating* status. Requests that have been recalled will have a *Correction* status. Requests that have requested modifications will have a *Rejected* status.

To revise an SF 182 request:

Step 1: Open the request in the SF182 tab. For instructions, see [Opening an SF 182 Request Through the SF 182 Tab](#).

Step 2: Click the **Edit** button.

View IDP Shared View Competency Models SF 182 Reports Dashboards +

SF 182 Request
SF-Training-000193

Show Feed

Approval History (3)

SF 182 Request Detail Edit GSA Continuing Service Agreement Reset Approval Process

▼ General Information (reference section for requester)

Requester Instructions - General Info Users creating a training request should begin by completing the 'Activity' section followed by the Vendor, Course Data and C section serves mostly as a reference for a user making a request. Please note the following: The 'Request Status' field will be 'Approved/Concurrence' section. The 'Request Status' is set to 'Initiating' when a request is created. The 'Approval Process' is

Step 3: Make the changes to the request.

Step 4: Click the **Save** button.

Your changes will now be saved and you can submit the request for approval. For instructions, see [Submitting a Saved SF 182 Request](#).

4.3 Marking a Request as Complete

Once you complete an activity, you will need to mark the request as complete. You can only do this for requests that have reached final approval and have been updated by the Purchasing Training Coordinator (PTC). For example, if the request covers a training class, once you complete the class you will need to mark it as complete. You will receive email notifications when the training end date you entered in the request passes, followed by five and ten day reminders.

To do so:

Step 1: Open the request in the SF182 tab. For instructions, see [Opening an SF 182 Request Through the SF 182 Tab](#).

Step 2: Click the **Edit** button.

View IDP Shared View Competency Models SF 182 Reports Dashboards +

SF 182 Request
SF-Training-000193

Show Feed

Approval History (3)

SF 182 Request Detail Edit GSA Continuing Service Agreement Reset Approval Process

▼ General Information (reference section for requester)

Requester Instructions - General Info Users creating a training request should begin by completing the 'Activity' section followed by the Vendor, Course Data and C section serves mostly as a reference for a user making a request. Please note the following: The 'Request Status' field will be 'Approved/Concurrence' section. The 'Request Status' is set to 'Initiating' when a request is created. The 'Approval Process' is

Step 3: In the *General Information* section, check the box labeled *Training Completed*.

Purchase Training Coord. Instructions: Please review all the details of the requesting user's training request and contact the training vendor for payment and registration. The 'Vendor Information' section includes the contact details for the training vendor. Simply hover over the 'Training Vendor Name' field or 'Vendor Contact' field to view details of the vendor (i.e. telephone, website, email, etc.). The 'Training Course Data' section includes the information regarding the type of training and the 'Cost and Information - Training Requester' section details the costs of the requested training. The 'Costs and Billing Information - Purchasing Training Coordinator' is only intended for the Purchasing Training Coordinator to complete and as the Purchasing Training Coordinator it is your responsibility to complete this. Fields marked with a red stripe are required. Additionally, some fields include help text that will assist you with completing the information needed within the field.

General Information

SF 182 Training Name	SF-Training-000193	Request Status Final Approval
SF 182	SF182 0078	<div style="border: 2px solid red; padding: 2px;">Training Completed <input checked="" type="checkbox"/></div>
Terms and Conditions - Accepted	<input type="checkbox"/>	Cancel Training <input type="checkbox"/>
Continued Svc Agreement Accepted Date		Was Money Obligated? --None--

Step 4: Click the **Save** button.

5. Cancelling Your SF 182 Request

You can work with your supervisor to cancel a request. When a request is cancelled, it will be saved in the system for tracking purposes.

Step 1: Recall the request. To do so, see [Recalling Your Submitted SF 182 Request](#).

Step 2: Reach out to your supervisor and ask him or her to cancel the request. Provide your supervisor with the below information. If you do not have the information, contact the Purchasing Training Coordinator (PTC) listed in the record:

- State whether or not money was obligated for the request
- If money was obligated, state if the money is refundable
- If money is refundable, provide the deadline for requesting a refund

Step 3: *(to be taken by the **Supervisor**)* Your Supervisor will then log into the IDP application and complete the steps to cancel the request.

6. Manually Sharing Your SF 182 with Colleagues

You can manually share your SF 182 record with colleagues at any time. Users with whom you manually share an SF 182 can view the SF 182 record and all requests associated with it.

To manually share an SF 182:

Step 1: Open the record in the SF182 tab. For instructions, see [Opening an SF 182 Request Through the SF 182 Tab](#). Just open the SF 182 itself and not a request associated with it.

Step 2: Click the **Sharing** button.

IDP Shared View Competency Models **SF 182** Reports Dashboards +

SF 182
SF182 0078
to List: SF 182

SF 182 Request (2)

SF 182 Detail Edit **Sharing**

Instructions

Requesting User - SF 182 Instructions

Please complete the 'Trainee Information' section listed below. Within the 'Related IDP' field, add the related IDP. You will be able to select an Approved IDP for the current and upcoming FY. If at some point throughout the process, you need to automatically update the 'Related IDP' field to include the new Approved IDP (users should also update the 'Related IDP' field on the Request page(s) if applicable). Please complete the fields below; the help text will guide you on what information to provide. After completing the information within this page, select 'Save'. After saving, select the 'New SF 182 Request' button where you can complete the information regarding the training you are requesting as well as where you want to share the record.

Step 3: On the screen that opens, click the **Add** button.

This page lists the users, groups, roles, and territories that have sharing access to SF182 0078. Click **Expand List** to view all users with sharing access.

View: **All** Clone Create New View

A B C D E F G H I J K L M

User and Group Sharing				
Action	Type	Name ↑	Access Level	Reason
	User	Asha Chembuli	Read Only	Approver2 Access
	User	Catherine Veillette	Read/Write	Supervisor Access

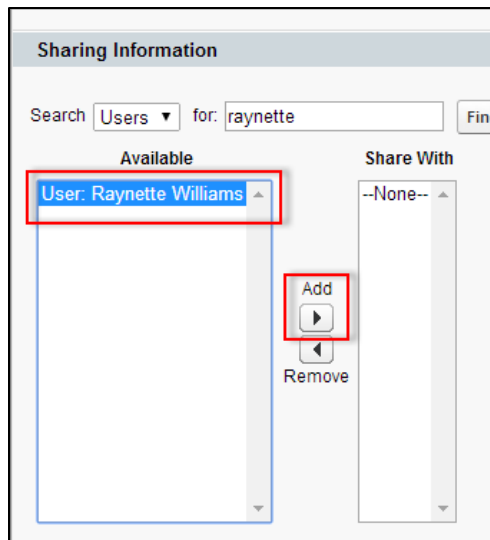
Step 4: In the screen that opens, click the **Search drop down menu** and select *Users*. Then, type in the name of the person with whom you would like to share the SF 182 and click **Find**. A list of names matching your search will appear.

Sharing Information

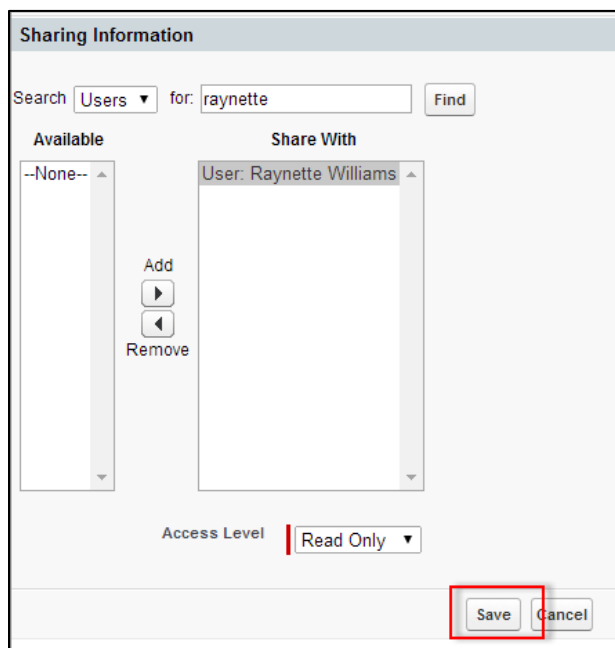
Search **Users** for: **Find**

Available Share With

Step 5: Click on the user's name with whom you would like to share the record in the *Available* list and then click the **Add arrow button**. The user's name will now appear in the *Share With* list.



Step 6: Click **Save**. The SF 182 will now be shared with that user, who can access your SF 182, including the requests associated with it, under the *SF 182 tab* when he or she is logged into the application.



7. Viewing Existing SF 182s

You can view your SF 182 records through the SF 182 tab. You can also run an SF 182 report in Salesforce and view SF 182 dashboards.

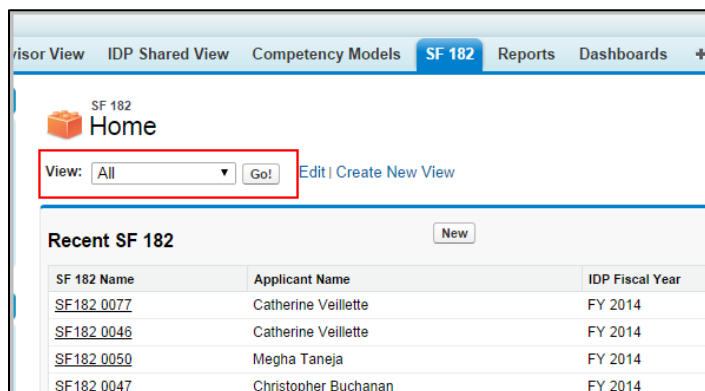
7.1 Accessing your SF 182s Through the SF 182 Tab

The SF 182 tab will show you the SF 182 records that:

- You own as the Requester (you can view the content of an SF 182 when you are the Requester at anytime, regardless of the request status)
- List you as the Supervisor once the request has been submitted for approval and is moving through the approval process or has received final approval
- List you as an Approver when it is your turn to review the record (Approvers may only view SF 182 records when it is their turn to approve or request modifications)
- List you as the Purchasing Training Coordinator (PTC) after final approval is received
- Have been manually shared with you

Step 1: While in the SF 182 tab in the IDP application, locate the SF 182 record containing the request that you would like to view.

Hint: The tab defaults to show only SF 182 records you've recently viewed. To view all the SF 182 records to which you have access, click the drop down menu next to the *View field*, select **All**, and then click the **Go!** button. You will now see a complete list of SF 182s that you can access at that moment.



Step 2: Open the SF 182 by clicking the SF 182's hyperlink in the column labeled *SF 182 Name*. The SF 182 record will open. As a reminder, the SF 182 that opens is the top level version of the record. Contained within the record are links to the applicable individual requests associated with

that record.

Recent SF 182 New				
SF 182 Name	Applicant Name	IDP Fiscal Year	Cumulative Amount	Create
SF182 0077	Catherine Veillette	FY 2014	500.00	9/22/2
SF182 0046	Catherine Veillette	FY 2014	9,100.00	9/3/20
SF182 0050	Megha Taneja	FY 2014	16,500.00	9/4/20
SF182 0047	Christopher Buchanan	FY 2014	1,002.50	9/3/20
SF182 0043	Megha Taneja	FY 2014	600.00	9/3/20
SF182 0041	Catherine Veillette	FY 2014	410.98	9/3/20
SF182 0049	Christopher Buchanan	FY 2014	2,005.00	9/3/20
SF182 0048	Christopher Buchanan	FY 2014	1,002.50	9/3/20

Step 3: To view a specific request associated with the SF 182, scroll to the bottom of the record to the section labeled *SF 182 Request*. You'll see a list of all requests associated with that SF 182. To open a specific request, click the applicable hyperlink in the column labeled *SF 182 Training Name*. The request will open.

Grade

Pay Plan

Created By Catherine Veillette, 9/22/2014 3:49 PM

Last Modified By Catherine Veillette, 9/23/2014 10:40 AM

Owner Catherine Veillette [Change]

Edit

Delete

Sharing

SF 182 Request

New SF 182 Request

SF 182 Request Help

Action	SF 182 Training Name	Total (TF and BM)	Cumulative Amount	Grand Total Training Costs	Activity Name	Supervisor	Purchasing Training Coordinator
Edit Del	SF-Training-000179	500.00	1,000.00	500.00	My first activity	Megha Taneja	Christopher Buchanan
Edit Del	SF-Training-000187	500.00	1,000.00	500.00	My first activity	Megha Taneja	

[Back To Top](#)
[Always show me more records per related list](#)

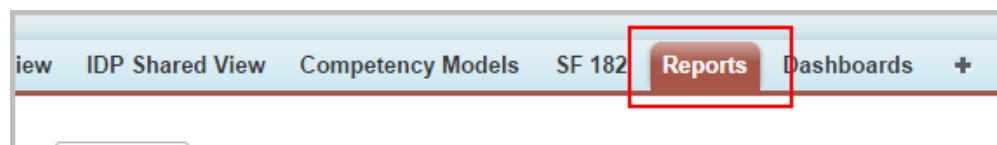
7.2 Using SF 182 Reports and Dashboards

The IDP application has pre-built, SF 182-specific reports and dashboards. Access to certain pre-saved SF 182 reports requires special access to the application. Not all users will have access to all the SF 182-specific reports in the Reports tab. You can, however, create your own customized SF 182 reports. The dashboards provide a high-level overview of all the applicable records in the application. The SF 182-specific reports and dashboards function the same as standard Salesforce reports and dashboards.

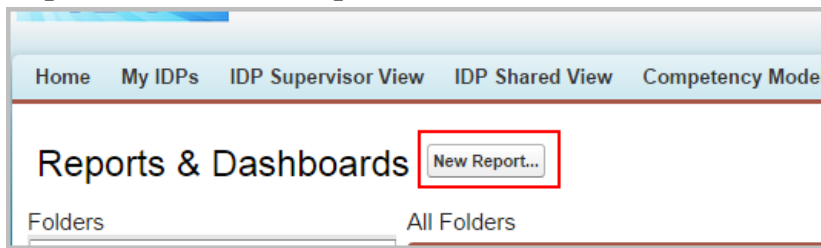
7.2.1 Running an SF 182 Report

To run an SF 182 report:

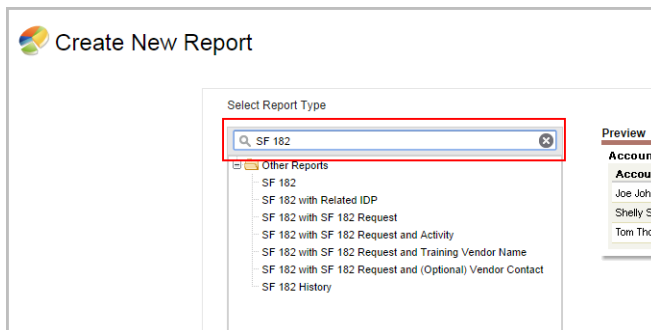
Step 1: Click the **Reports** tab.



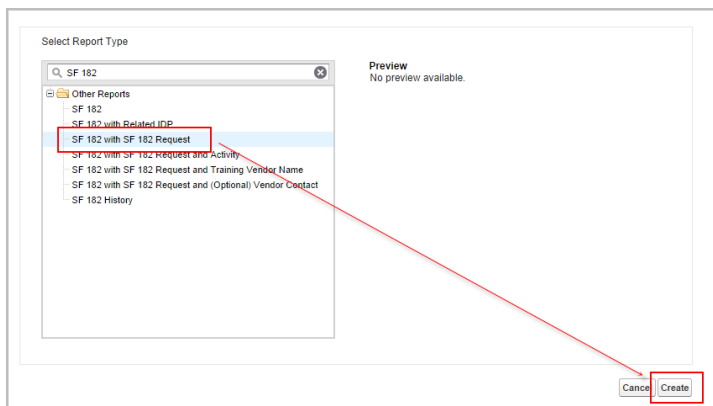
Step 2: Click the **New Report** button.



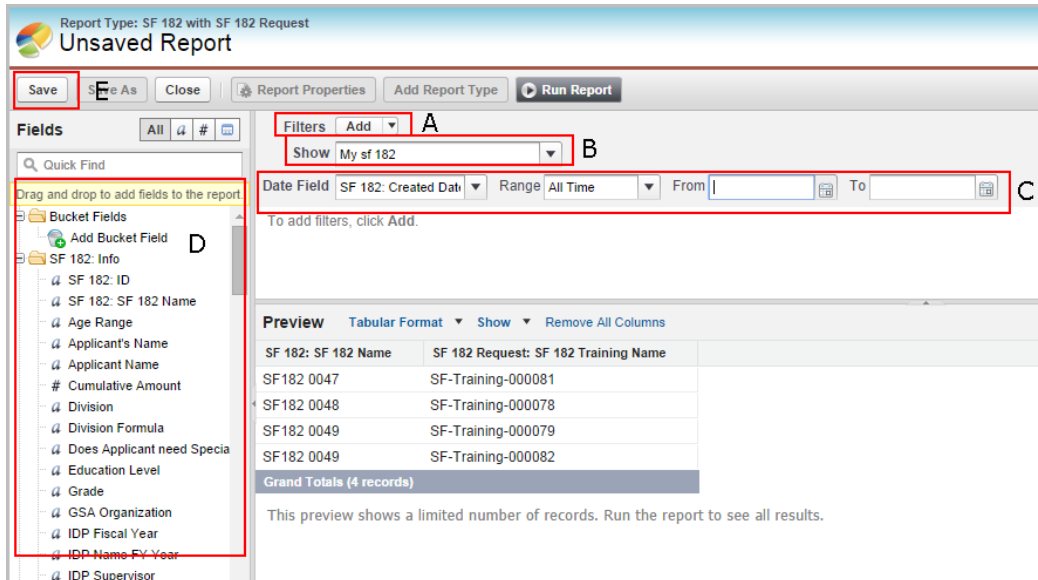
Step 3: In the *Quick Find* field, enter SF 182 and click **Enter** on your keyboard. A list of pre-saved SF 182 reports will open.



Step 4: Click the report that interests you and then click the **Create** button. A preview of the report will open.



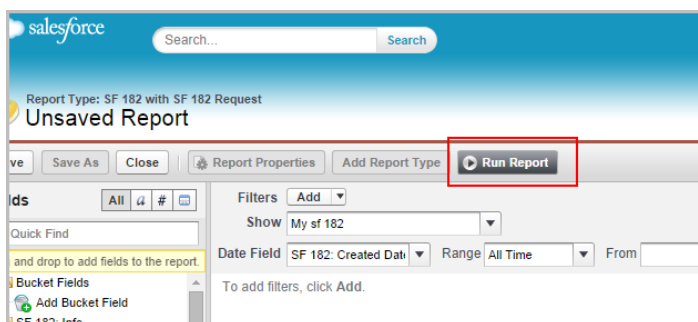
Step 5: (optional) Modify the report data or perform another function associated with the report.



Hints:

- A. Add or change a filter for the report data.
- B. Select if you'd like the report to pull only the records you own or all the records you are able to view as a Supervisor, Approver, or PTC and that have been manually shared with you, as well.
- C. If needed, restrict the report data to a specific timeframe.
- D. Change the fields the report will pull. To do so, click on the field you want to see and drag it to the fields visible under Preview.
- E. Click **Save** to save the report to run in the future.

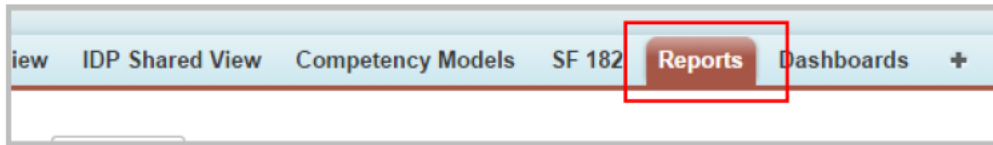
Step 6: Run the report by clicking the **Run Report** button.



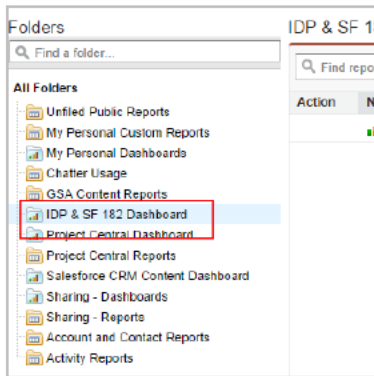
7.2.2 Accessing an SF 182 Dashboard

To access an SF 182 dashboard:

Step 1: Click the **Reports** tab.



Step 2: Click the folder labeled **IDP & SF 182 Dashboard**. The pre-built dashboard option will appear.

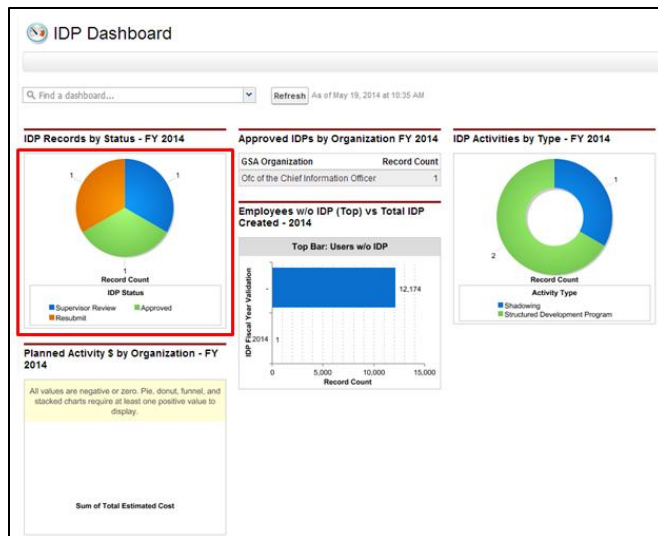


Step 3: Click on the dashboard labeled *IDP Dashboard*. The IDP and SF 182 dashboards will populate.

Note: Each dashboard is generated from a specific report. While the reports you run in the application provide information on only the records for which you are the owner, Supervisor, Approver, or PTC and the records that have been manually shared with you, the dashboards pull data from every applicable SF 182 record in the application. The information displayed in the dashboards will be the same for all users, regardless of record access. Dashboards only provide a high level overview of the information and do not show details on specific records.

Step 4: (optional) View the report from which the dashboard was generated by clicking on the chart associated with the dashboard.

Note: Though the data in the dashboard reflects all the applicable records in the application, the report you will see when clicking on the dashboard will only display data on the records for which you are the owner, the Supervisor, Approver, or PTC, and the records that have been manually shared with you.

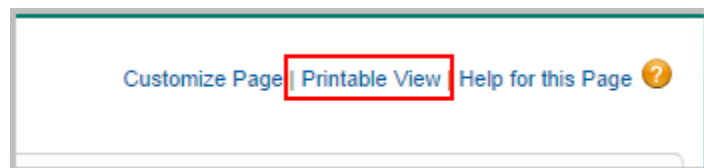


8. Printing Your SF 182 Records

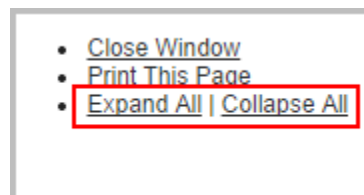
To print an SF 182, follow the below steps.

Step 1: Open the SF 182 record or request you would like to print.

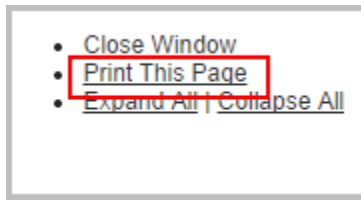
Step 2: Click **Printable View** in the top right corner of the SF 182 record. The record will open in a new window in a printer-friendly format.



Step 3: (optional) The default printer-friendly version of the record prints all the information in the SF 182. To print less information, click **Collapse All**. If you click **Collapse All** and change your mind, click **Expand All** to print all the information in the record.

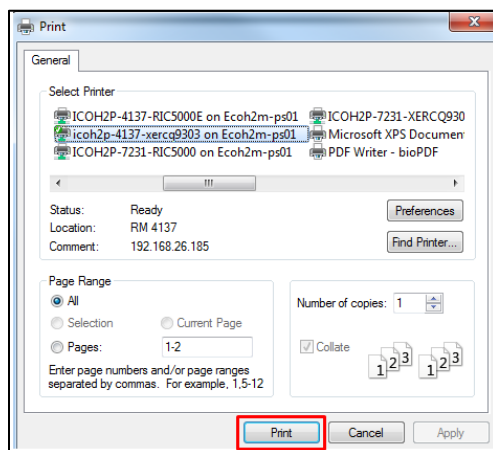
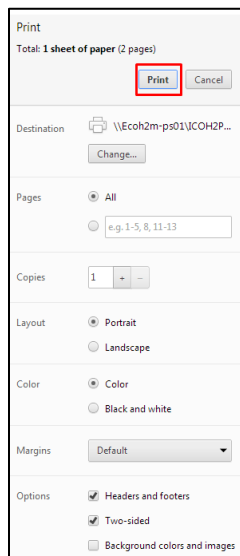


Step 4: Click **Print This Page**. The *Print box* will open. This is the same *Print box* that appears anytime you print.



Step 5: Select the printer you would like to use and click **Print**.

Below are two examples of what your *Print box* may look like:



The SF 182 will now print to the printer you selected.



MEMORANDUM FOR JEFFREY A. KOSES
SENIOR PROCUREMENT EXECUTIVE

THRU: VIRGINIA A. HUTH, DIRECTOR
OFFICE OF ACQUISITION POLICY, INTEGRITY AND
WORKFORCE (MVA)

FROM: BEA DUKES
ACQUISITION CAREER MANAGER (MVAE)

SUBJECT: Request for a Temporary Waiver of Mandatory FAC-COR
Certification for a FISMA Task Order to support the GSA Office of
the Inspector General

As the Acquisition Career Manager, I have reviewed the waiver request submitted by the GSA Office of the Inspector General for Ms. Donna Peterson-Jones to be named as the Contracting Officer Representative (COR) selectee on the fiscal year (FY) 2015 Federal Information Security Management Act (FISMA) task order.

Ms. Peterson-Jones is current with her FAC-COR Level I certification and has completed all training required to attain Level II certification. Based on the request, she will be closely supervised during this waiver period while she performs COR duties and attains the one year of experience required for Level II certification.

Based on a review of the waiver request and GSAM 501.604(b), I hereby recommend approval of a temporary waiver not to exceed July 31, 2016.

If you have questions or need additional information, please feel contact me at Beatrice.Dukes@gsa.gov or (202) 779-2417.

SENIOR PROCUREMENT EXECUTIVE APPROVAL:

After reviewing the information submitted in the justification, I am granting a temporary waiver of the experience requirement until July 31, 2016.

(b) (6)

Jeffrey A. Koses, Senior Procurement Executive (MVA)

Attachment

March 25, 2016
Date